



Update Rebalance Option

Visit <https://retirementplanconsultants.info> and click **Account Access**.

Type in your **Username** and **Password**, or follow the instructions provided in your welcome letter.

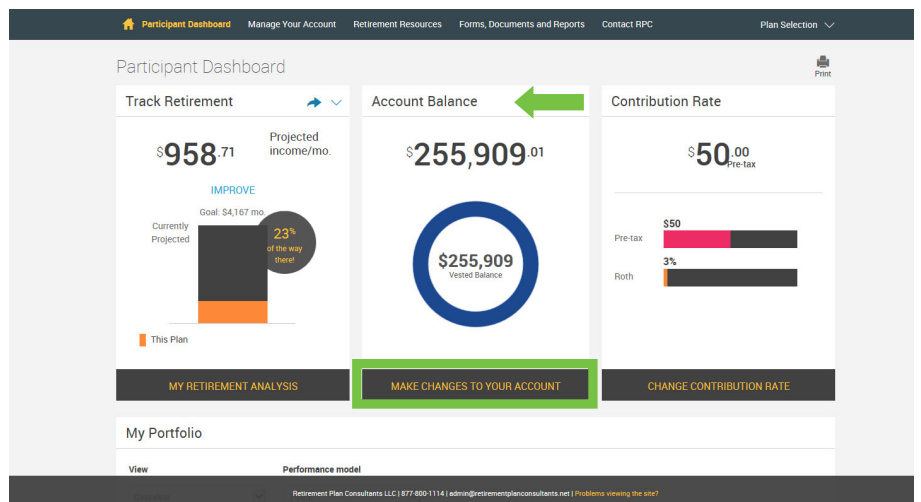
Select role from dropdown menu: **Participant**

Click the **Login** button

A One-Time PIN (OTP) is required to login using multi-factor authentication (MFA). If you need additional guidance with the OTP process, click the **Guide to Logging in with MFA** link (located at the top of this grey login box).

On the Participant Dashboard, your **Account Balance** will display.

Click the **Make Changes to Your Account** button.



If you already have a rebalance option set up this section will state the date of the next rebalance.

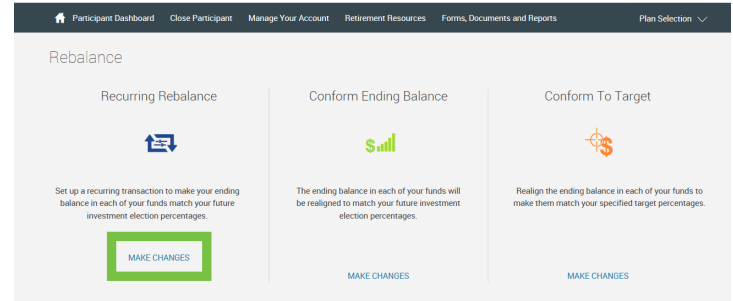
Click the **Get Started** link under the **Rebalance** option to make changes.



Update Rebalance Option

If you already have a rebalance option setup this section will state the frequency.

Select the **Make Changes** link under the **Recurring Rebalance** section.



To **Turn ON** the recurring rebalance, complete the following sections:

1. How often you would like to rebalance:
 - Once a year
 - Twice a year
 - Every three months
 - Every month
2. Set date of first rebalance.
3. Enter threshold percent for rebalance.
4. Click the **Next** button.

RPC rebalances on the 26th day of the month.

To **Turn OFF** the recurring rebalance:

- Toggle the button to **OFF**.
- Click the **Next** button.

Review your selections and the click the **Submit** button.

You will be provided a **Confirmation Number** for your records.

Click the **Done** button.