Online Enrollment

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

Do you already have a Username and Password?

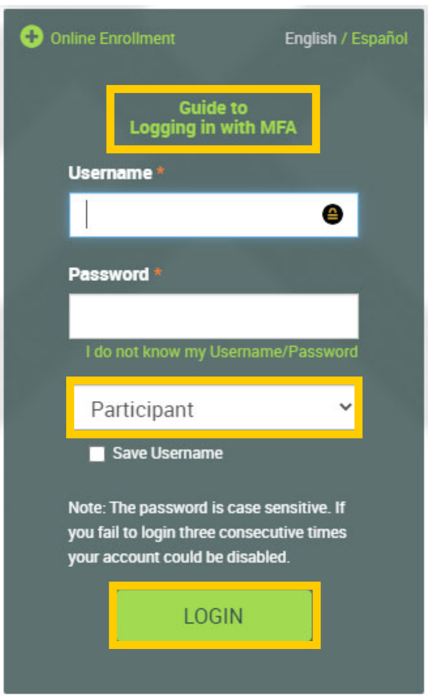
YES

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

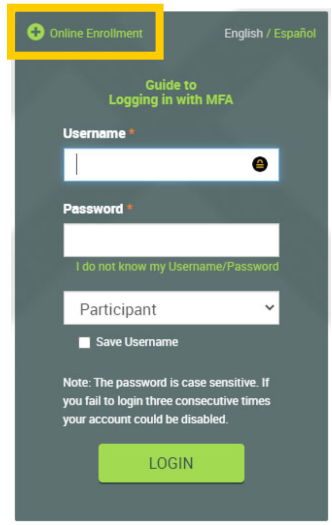
A One-Time PIN (OTP) is required to login using multi-factor authentication (MFA). If you need additional guidance with the OTP process, click the **Guide to Logging in with MFA** link (located at the top of this gray login box).

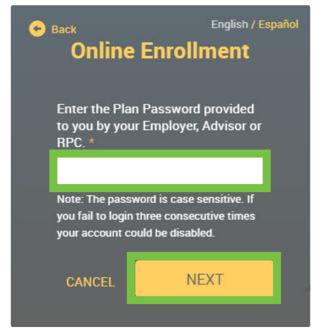


If you do not remember your **Username** and/or **Password**, click the 'I do not know my Username/Password' link and follow the prompts.

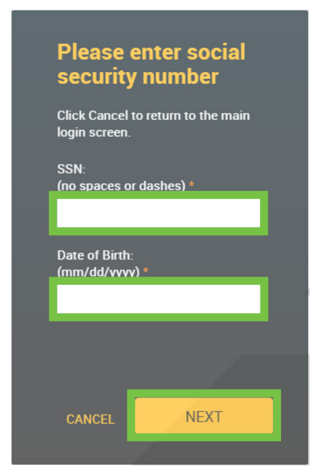
NO

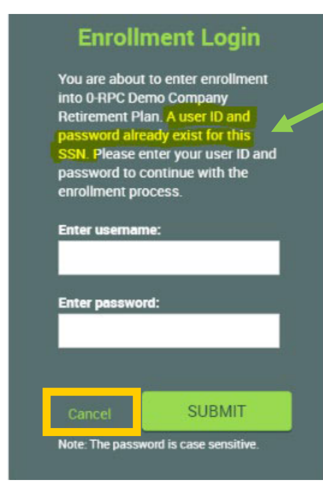
Click **+ Online Enrollment**. Type the password provided to you by your Plan Sponsor and click the **Next** button.





Type your **Social Security Number** (no spaces, no dashes) and your **Date of Birth** (mm/dd/yyyy) and click the **Next** button.





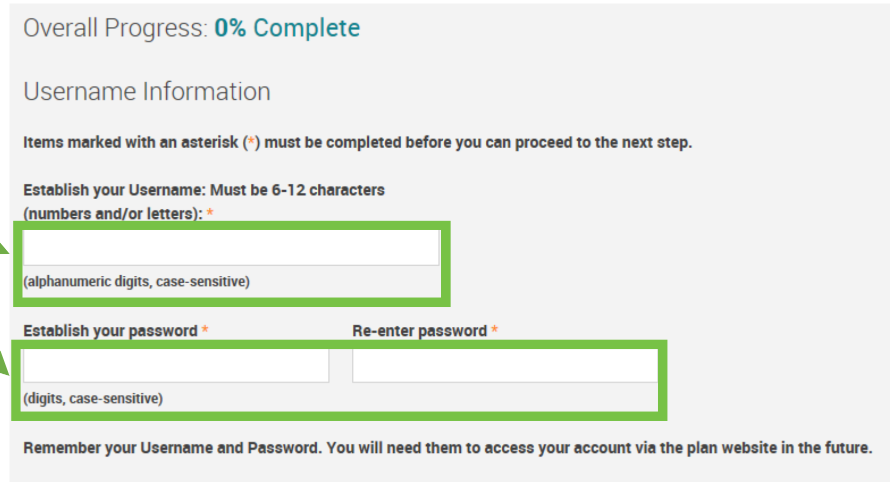
*If you receive the following **message**, click **Cancel** and choose the "**I do not know my username/password"** link to reset your credentials. Follow the prompts to reset your username and password.

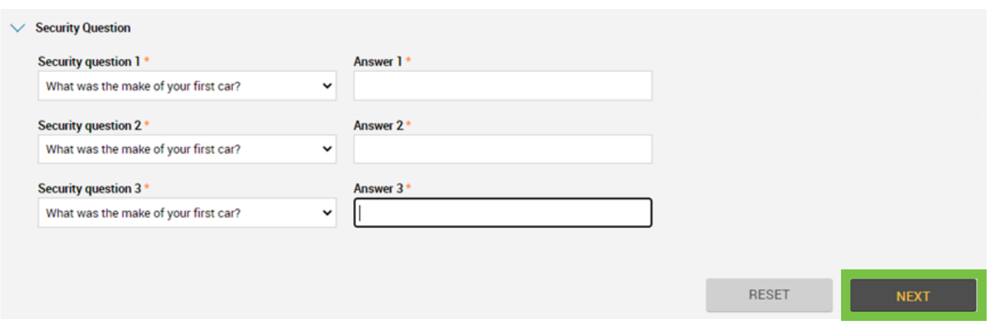
Note: You may already have a user ID because your employer already provided some of your information, and an account has been started for you.

Online Enrollment

Follow the **Enrollment Wizard** to enroll online. Please read all the instructions online before completing every step.

Enter a username and password of your choice.





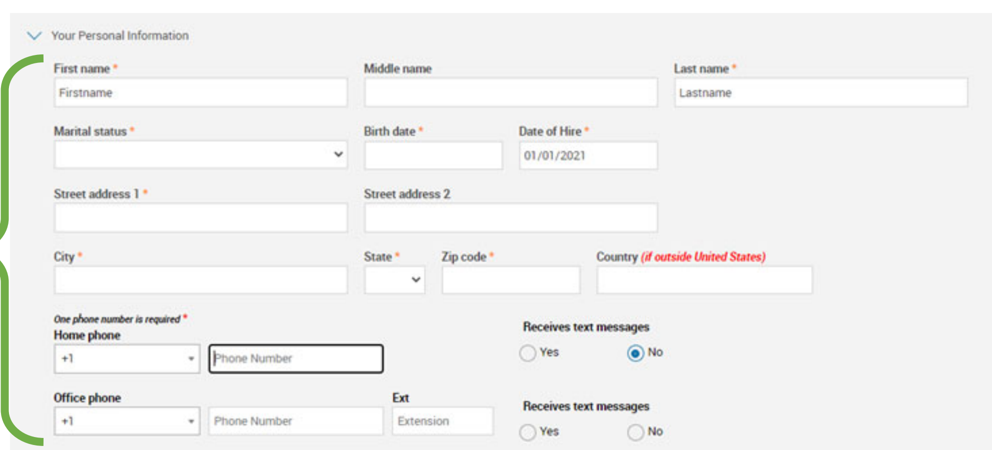
Review and change any of the **Security Questions**, as desired.

When answering security questions it will need to be typed the same way answered here – capitalization, spelling, etc.

Click the **Next** button.

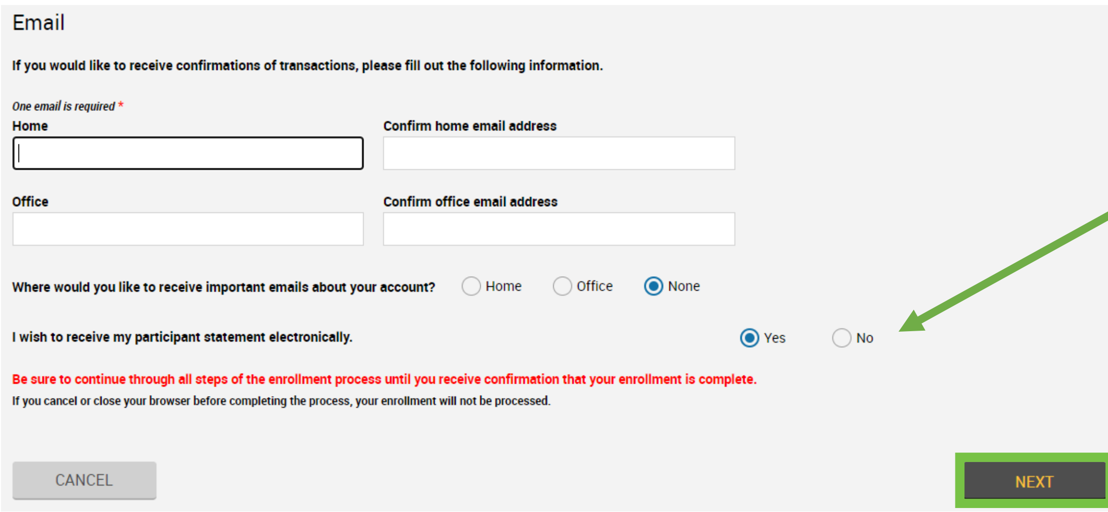
Review and, as needed, update your **Personal Information** details.

Please keep in mind that all items marked with an asterisk (*) must be completed.



Online Enrollment

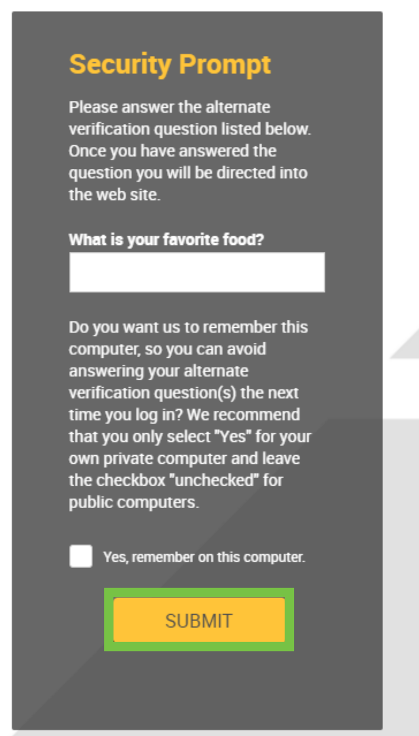
Expand the **Email** details section. Review and update your **Email** information. Please specify whether you prefer to receive important emails about your account to either your **Home** or **Office** email.



Electronic statements are recommended, but you can change this at any time when you log in to your account.

Click the **Next** button.

A One-Time PIN is required for authentication while logging into your account. It is recommended to choose an email to receive notifications so you can set your email to receive the One-Time PIN. It can also be sent via text message. Message and data rates may apply.



Before you go to the next screen you will receive a security prompt, which will be a question from one of the security questions you just set up.

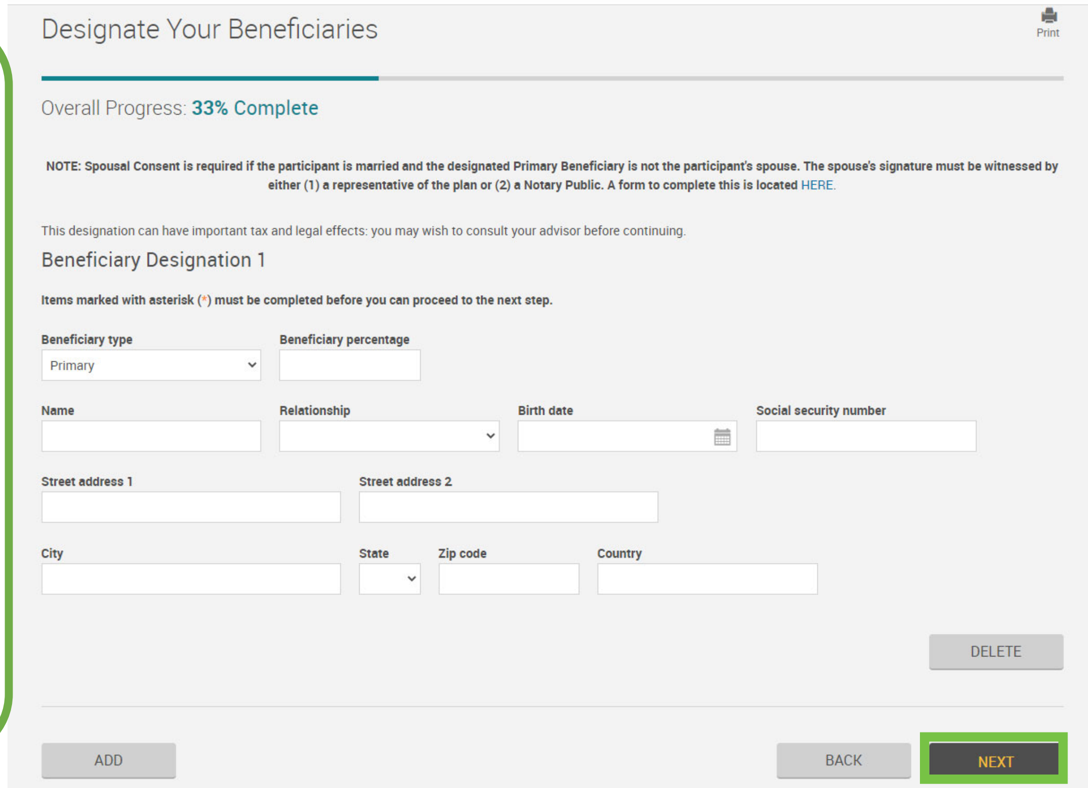
Answer the security prompt and then click the **Submit** button.

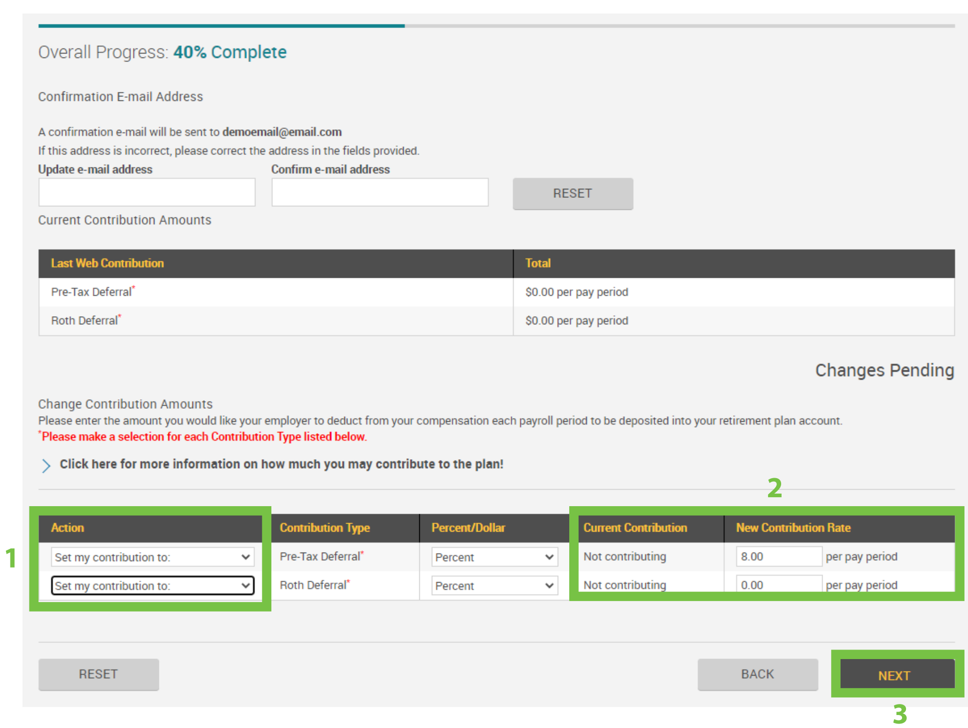
Online Enrollment

Review and update the **Designate Your Beneficiaries** section, providing as much information as possible.

Please keep in mind, this is not a requirement, but recommended*. You can update your beneficiary information online at any time.*

Click the **Next** button.





1) On the next screen choose the **Action** dropdown menu next to each **Contribution Type** and select **Set my contributions to:**

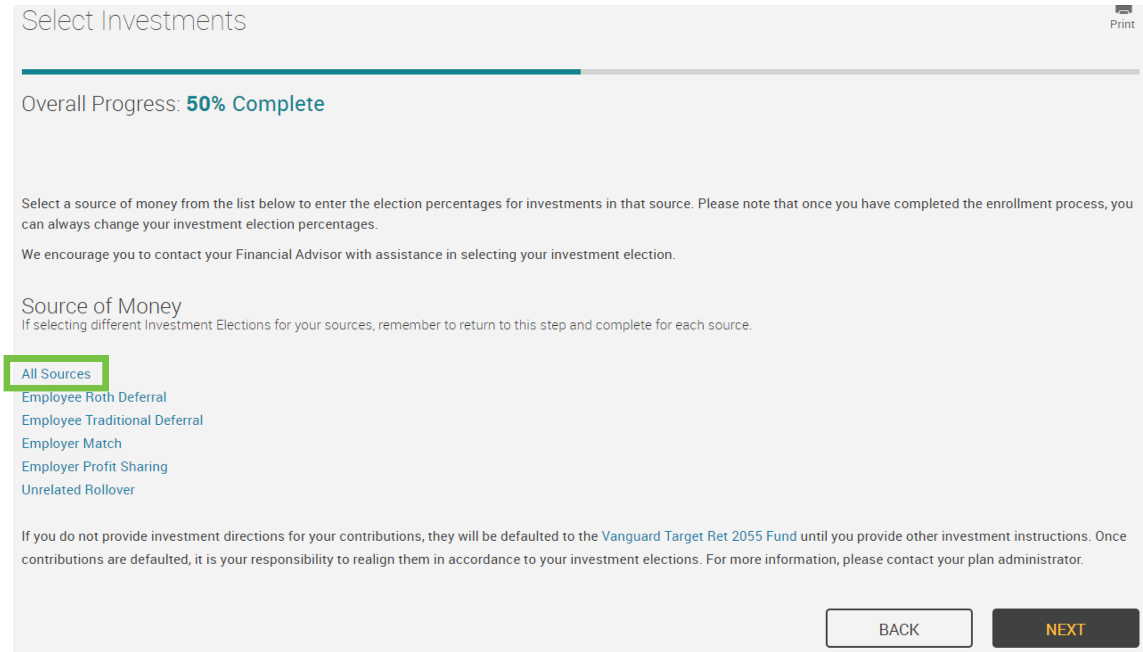
2) Then update the **New Contribution Rate** to the desired amount for each contribution type, *even if the desired amount is zero*. The amount entered reflects what you would like your employer to withhold each pay period as a deposit into your retirement account.

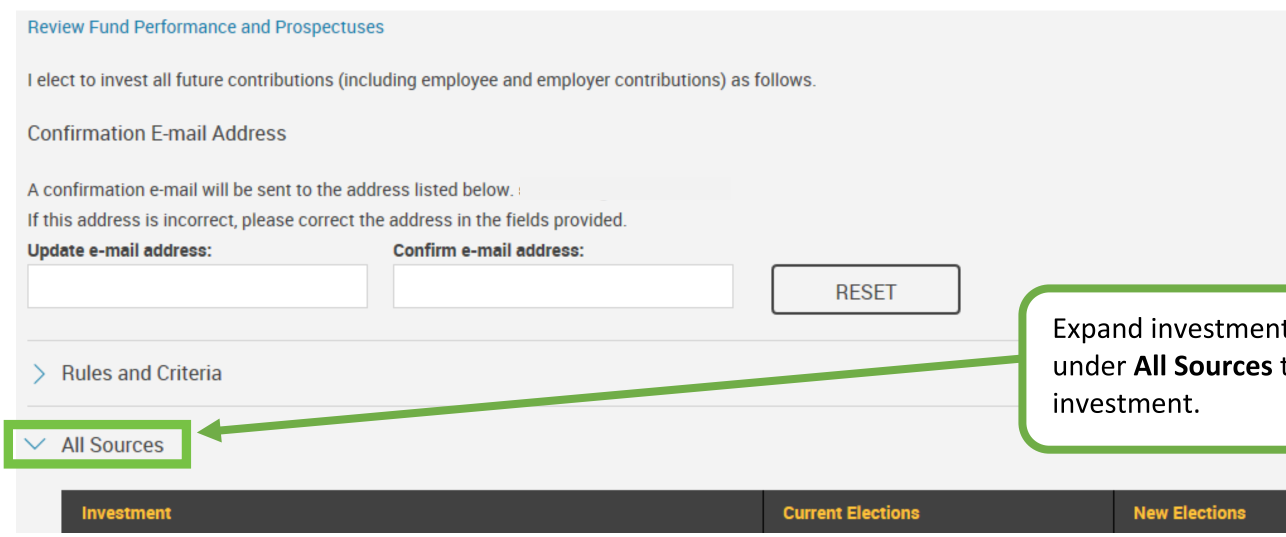
3) Click the **Next** button when all is correct.

Online Enrollment

Choose a **Source of Money** from the list and insert the selected percentages for the investments of that source.

To select the same investment direction for all money, click the **All Sources** link.



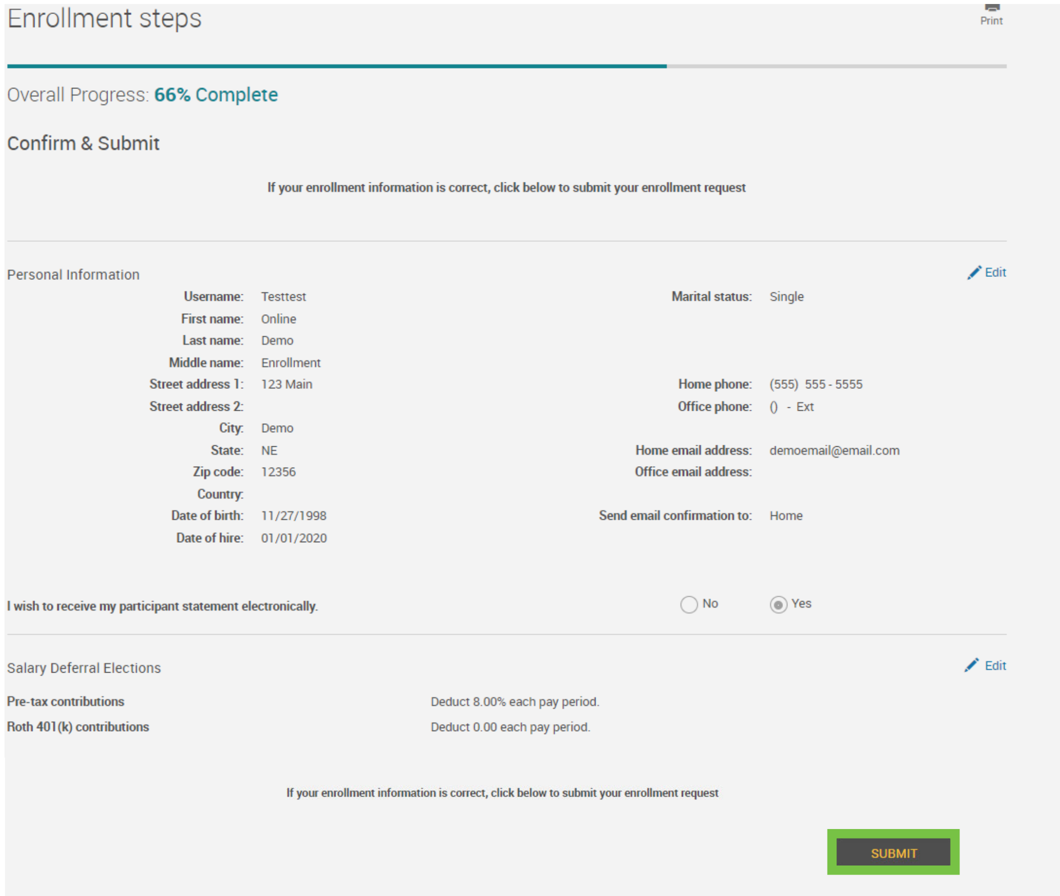


Expand investment category under **All Sources** to select investment.

If you need help determining your risk tolerance there is an Asset Allocation Questionnaire that can help you with determining your risk tolerance.

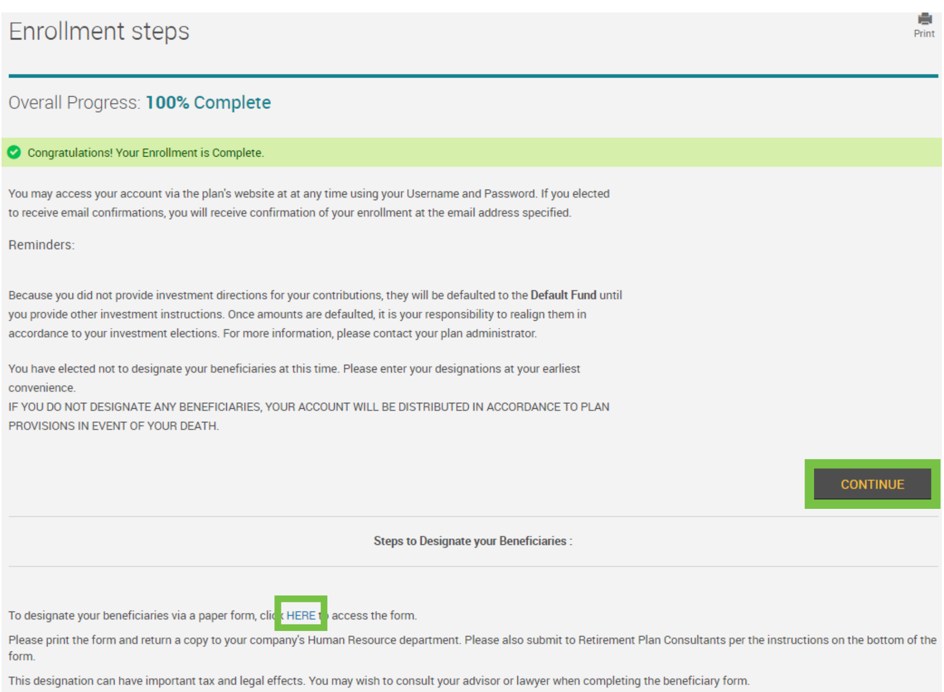
Once you have chosen elections equaling 100%, Click the **Next** button.

Online Enrollment



Review your information.

Click the **Submit** button.



The confirmation page will display.

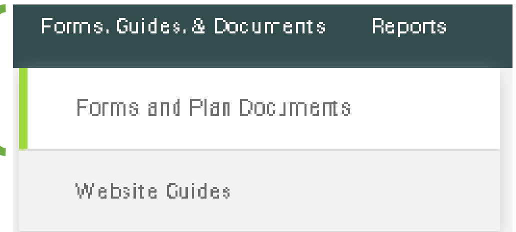
This screen offers another opportunity to designate your beneficiaries. Click the **HERE** link to access the paper form.

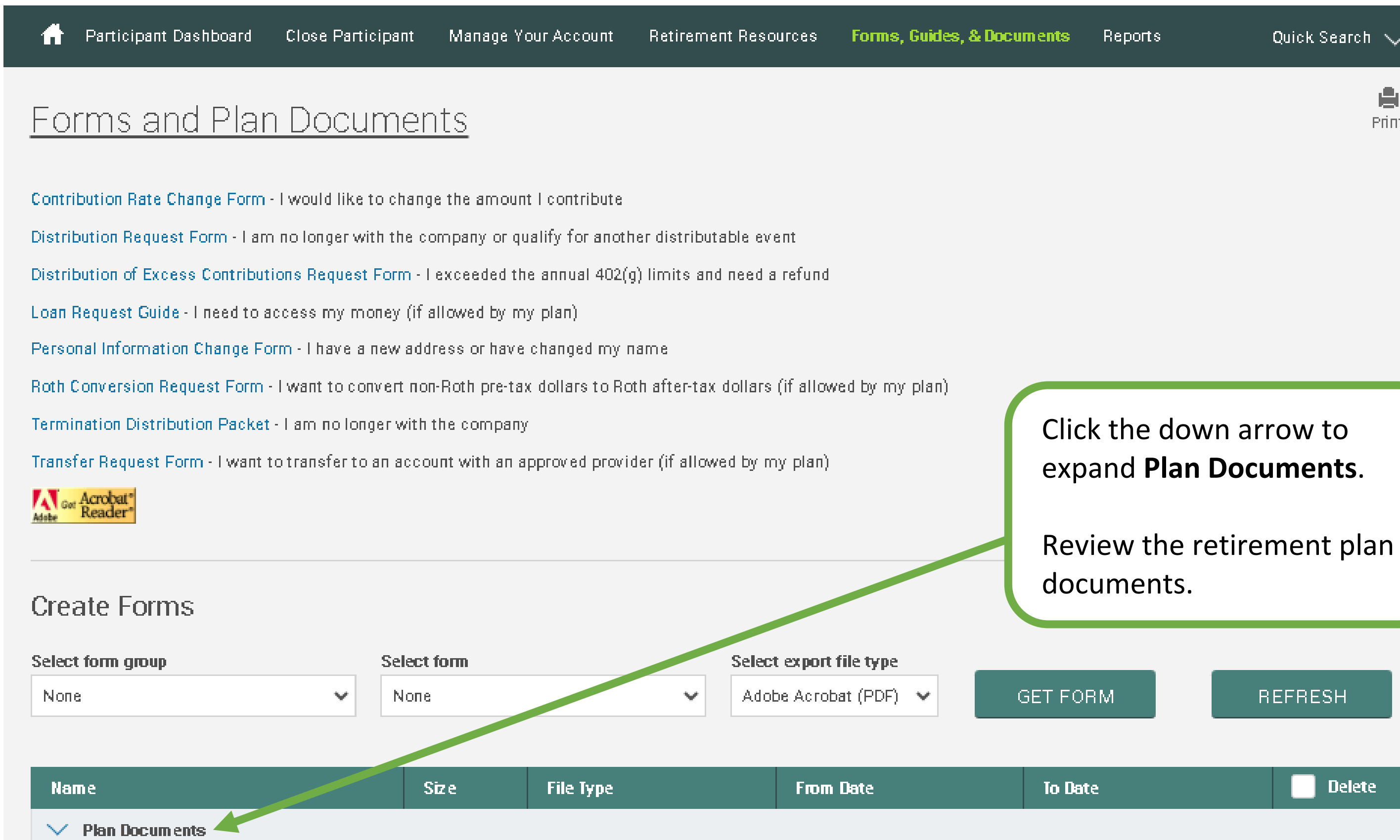
Click the **Continue** button to access the participant web menu.

Online Enrollment

Review the important retirement plan disclosures shown.

Click **Forms, Guides, & Documents** on the navigation menu and choose **Forms and Plan Documents** off the list.





Click the down arrow to expand **Plan Documents**.

Review the retirement plan documents.