



# 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.

Overall Progress: **0% Complete**

### Username Information

Items marked with an asterisk (\*) must be completed before you can proceed to the next step.

Establish your Username: Must be 6-12 characters (numbers and/or letters):\*

(alphanumeric digits, case-sensitive)

Establish your password \*      Re-enter password \*

(digits, case-sensitive)

Remember your Username and Password. You will need them to access your account via the plan website in the future.

### Security Question

Security question 1 \*  
What was the make of your first car?  Answer 1 \*

Security question 2 \*  
What was the make of your first car?  Answer 2 \*

Security question 3 \*  
What was the make of your first car?  Answer 3 \*

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.

### Your Personal Information

First name \*  Middle name  Last name \*

Marital status \*  Birth date \*  Date of Hire \*

Street address 1 \*  Street address 2

City \*  State \*  Zip code \*  Country (if outside United States)

One phone number is required \*

Home phone  Phone Number  Ext

Office phone  Phone Number  Ext

Receives text messages  Yes  No

Receives text messages  Yes  No



# 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.

Email

If you would like to receive confirmations of transactions, please fill out the following information.

One email is required \*

Home  Confirm home email address

Office  Confirm office email address

Where would you like to receive important emails about your account?  Home  Office  None

I wish to receive my participant statement electronically.  Yes  No

Be sure to continue through all steps of the enrollment process until you receive confirmation that your enrollment is complete.  
If you cancel or close your browser before completing the process, your enrollment will not be processed.

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.

**Security Prompt**

Please answer the alternate verification question listed below. Once you have answered the question you will be directed into the web site.

What is your favorite food?

Do you want us to remember this computer, so you can avoid answering your alternate verification question(s) the next time you log in? We recommend that you only select "Yes" for your own private computer and leave the checkbox "unchecked" for public computers.

Yes, remember on this computer.

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.

Designate Your Beneficiaries Print

Overall Progress: **33% Complete**

NOTE: Spousal Consent is required if the participant is married and the designated Primary Beneficiary is not the participant's spouse. The spouse's signature must be witnessed by either (1) a representative of the plan or (2) a Notary Public. A form to complete this is located [HERE](#).

This designation can have important tax and legal effects; you may wish to consult your advisor before continuing.

Beneficiary Designation 1

Items marked with asterisk (\*) must be completed before you can proceed to the next step.

Beneficiary type: Primary  Beneficiary percentage:

Name:  Relationship:  Birth date:  Social security number:

Street address 1:  Street address 2:

City:  State:  Zip code:  Country:

Overall Progress: **40% Complete**

Confirmation E-mail Address

A confirmation e-mail will be sent to [demoemail@email.com](mailto:demoemail@email.com). If this address is incorrect, please correct the address in the fields provided.

Update e-mail address:  Confirm e-mail address:

Current Contribution Amounts

| Last Web Contribution | Total                 |
|-----------------------|-----------------------|
| Pre-Tax Deferral*     | \$0.00 per pay period |
| Roth Deferral*        | \$0.00 per pay period |

Changes Pending

Change Contribution Amounts  
Please enter the amount you would like your employer to deduct from your compensation each payroll period to be deposited into your retirement plan account.  
\*Please make a selection for each Contribution Type listed below.

[Click here for more information on how much you may contribute to the plan!](#)

| Action   | Contribution Type | Percent/Dollar               | Current Contribution | New Contribution Rate                    |
|--|-------------------|------------------------------|----------------------|--|
| 1 <input type="button" value="Set my contribution to:"/> | Pre-Tax Deferral* | <input type="text"/> Percent | Not contributing     | <input type="text"/> 8.00 per pay period |
| <input type="button" value="Set my contribution to:"/>   | Roth Deferral*    | <input type="text"/> Percent | Not contributing     | <input type="text"/> 0.00 per pay period |

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- 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.

Select Investments Print

Overall Progress: **50% Complete**

Select a source of money from the list below to enter the election percentages for investments in that source. Please note that once you have completed the enrollment process, you can always change your investment election percentages.

We encourage you to contact your Financial Advisor with assistance in selecting your investment election.

Source of Money  
If selecting different Investment Elections for your sources, remember to return to this step and complete for each source.

- All Sources**
- Employee Roth Deferral
- Employee Traditional Deferral
- Employer Match
- Employer Profit Sharing
- Unrelated Rollover

If you do not provide investment directions for your contributions, they will be defaulted to the Vanguard Target Ret 2055 Fund until you provide other investment instructions. Once contributions are defaulted, it is your responsibility to realign them in accordance to your investment elections. For more information, please contact your plan administrator.

## Review Fund Performance and Prospectuses

I elect to invest all future contributions (including employee and employer contributions) as follows.

### Confirmation E-mail Address

A confirmation e-mail will be sent to the address listed below.

If this address is incorrect, please correct the address in the fields provided.

Update e-mail address:

Confirm e-mail address:

> Rules and Criteria

∨ All Sources

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

Investment

Current Elections

New Elections

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.

Enrollment steps Print

Overall Progress: **66% Complete**

Confirm & Submit

If your enrollment information is correct, click below to submit your enrollment request

Personal Information Edit

|                   |            |                             |                     |
|-------------------|------------|-----------------------------|---------------------|
| Username:         | Testtest   | Marital status:             | Single              |
| First name:       | Online     | Home phone:                 | (555) 555 - 5555    |
| Last name:        | Demo       | Office phone:               | () - Ext            |
| Middle name:      | Enrollment | Home email address:         | demoemail@email.com |
| Street address 1: | 123 Main   | Office email address:       |                     |
| Street address 2: |            | Send email confirmation to: | Home                |
| City:             | Demo       |                             |                     |
| State:            | NE         |                             |                     |
| Zip code:         | 12356      |                             |                     |
| Country:          |            |                             |                     |
| Date of birth:    | 11/27/1998 |                             |                     |
| Date of hire:     | 01/01/2020 |                             |                     |

I wish to receive my participant statement electronically.  No  Yes

Salary Deferral Elections Edit

|                            |                               |
|----------------------------|-------------------------------|
| Pre-tax contributions      | Deduct 8.00% each pay period. |
| Roth 401 (k) contributions | Deduct 0.00 each pay period.  |

If your enrollment information is correct, click below to submit your enrollment request

**SUBMIT**

Enrollment steps Print

Overall Progress: **100% Complete**

✔ Congratulations! Your Enrollment is Complete.

You may access your account via the plan's website at any time using your Username and Password. If you elected to receive email confirmations, you will receive confirmation of your enrollment at the email address specified.

Reminders:

Because you did not provide investment directions for your contributions, they will be defaulted to the Default Fund until you provide other investment instructions. Once amounts are defaulted, it is your responsibility to realign them in accordance to your investment elections. For more information, please contact your plan administrator.

You have elected not to designate your beneficiaries at this time. Please enter your designations at your earliest convenience.

IF YOU DO NOT DESIGNATE ANY BENEFICIARIES, YOUR ACCOUNT WILL BE DISTRIBUTED IN ACCORDANCE TO PLAN PROVISIONS IN EVENT OF YOUR DEATH.

**CONTINUE**

Steps to Designate your Beneficiaries :

To designate your beneficiaries via a paper form, click **HERE** to access the form.

Please print the form and return a copy to your company's Human Resource department. Please also submit to Retirement Plan Consultants per the instructions on the bottom of the form.

This designation can have important tax and legal effects. You may wish to consult your advisor or lawyer when completing the beneficiary form.

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.

Forms, Guides, & Documents    Reports

Forms and Plan Documents


Website Guides

Participant Dashboard    Close Participant    Manage Your Account    Retirement Resources    **Forms, Guides, & Documents**    Reports    Quick Search

## Forms and Plan Documents

Print

[Contribution Rate Change Form](#) - I would like to change the amount I contribute  
[Distribution Request Form](#) - I am no longer with the company or qualify for another distributable event  
[Distribution of Excess Contributions Request Form](#) - I exceeded the annual 402(g) limits and need a refund  
[Loan Request Guide](#) - I need to access my money (if allowed by my plan)  
[Personal Information Change Form](#) - I have a new address or have changed my name  
[Roth Conversion Request Form](#) - I want to convert non-Roth pre-tax dollars to Roth after-tax dollars (if allowed by my plan)  
[Termination Distribution Packet](#) - I am no longer with the company  
[Transfer Request Form](#) - I want to transfer to an account with an approved provider (if allowed by my plan)



### Create Forms

Select form group:     Select form:     Select export file type:        

| Name           | Size | File Type | From Date | To Date | Delete                   |
|----------------|------|-----------|-----------|---------|--------------------------|
| Plan Documents |      |           |           |         | <input type="checkbox"/> |

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

Review the retirement plan documents.