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## How do I log in?

You can log into your retirement plan website by connecting to [www.planlogin.com](http://www.planlogin.com). Once logged in, you can view current account information, initiate transfers, designate new investment elections and update personal information.

To log in, you will need to enter the following information:

**Username:** Social Security Number (no dashes)

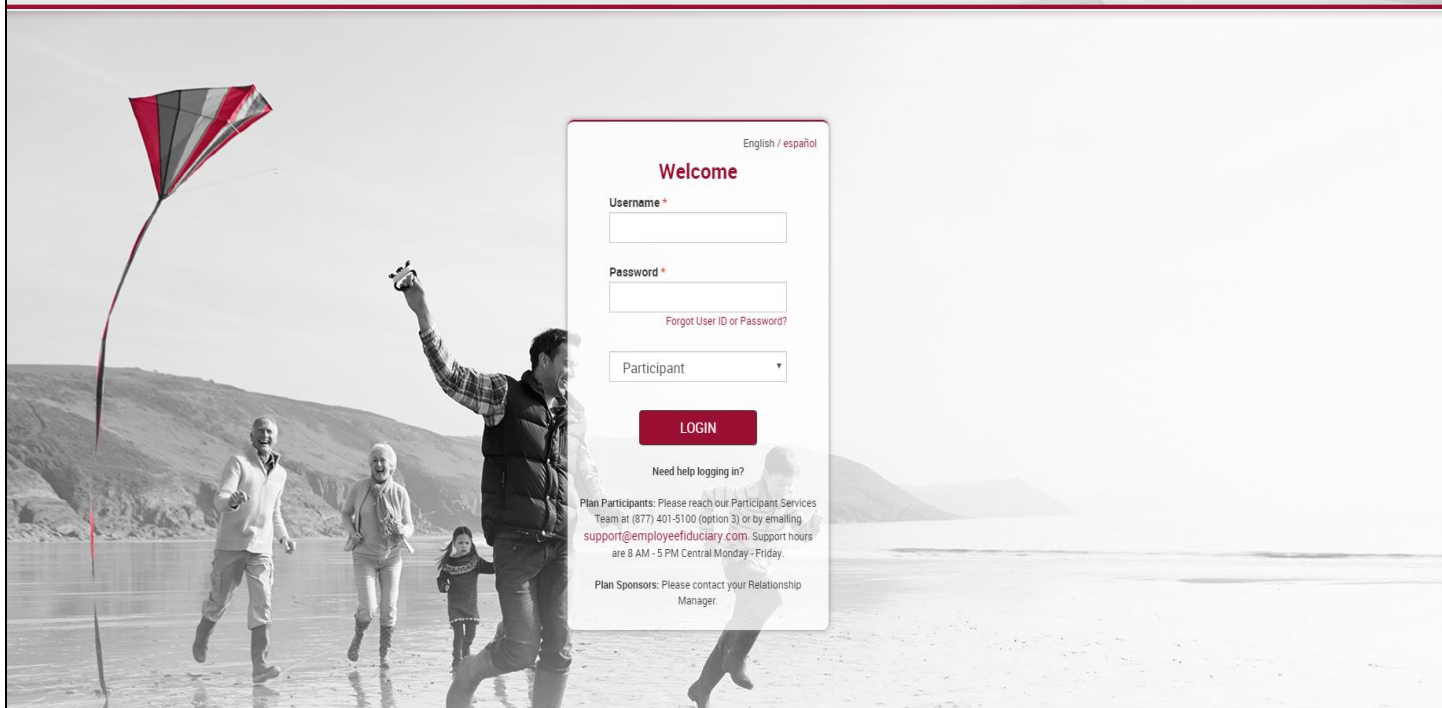
**Password:** Last 4 digits of Social Security Number

**Select Role:** Participant

If you have any issues logging in, you can contact our Participant Service Center at 1-877-401-5100 option 3. The Participant Service Center is available from 8AM-5PM Central Time, Monday - Friday, excluding market holidays.



*America's Low Cost 401k!*



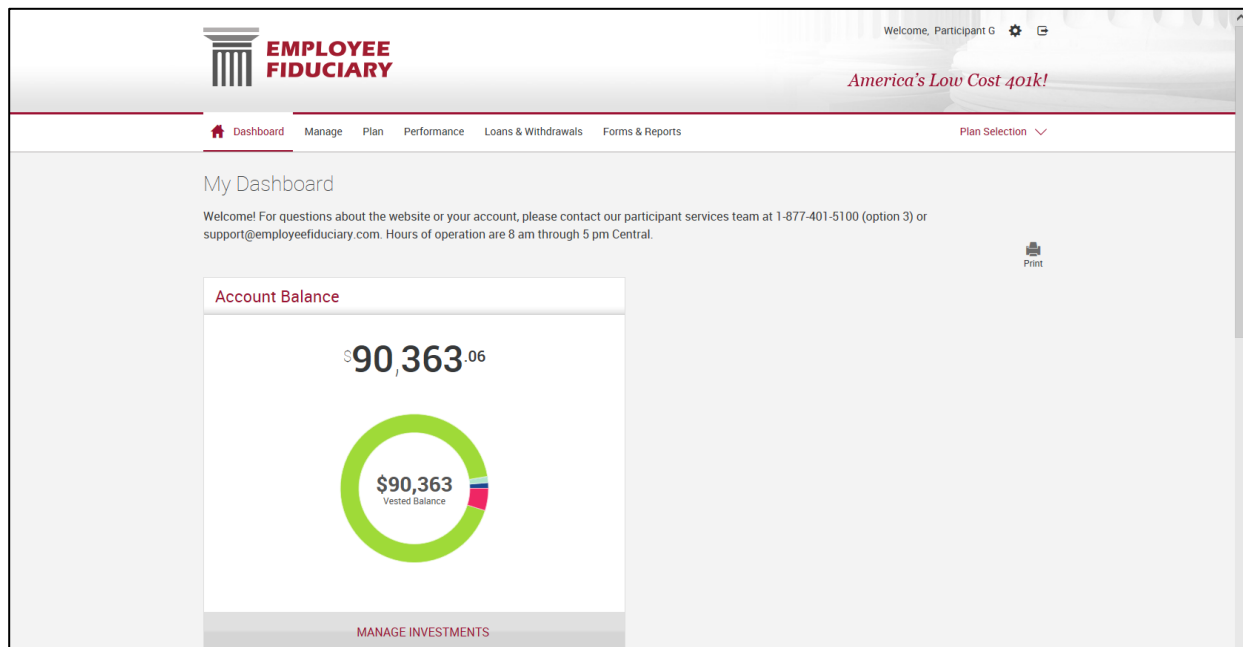
Upon logging in for the first time, you will be asked to establish answers to 3 security questions. You can choose any 3 questions from a list of 15. These security questions will be used for password resets and for verification when you log in from an unknown computer.

The screenshot shows the 'Security Setup' page. At the top left is the 'EMPLOYEE FIDUCIARY' logo. At the top right, it says 'Welcome, Participant Sample' and 'America's Low Cost 401k!'. The main heading is 'Security Setup' with a 'Print' icon. Below the heading is a paragraph: 'Each time you log in to this site from an unknown computer you will be asked to answer one of these questions as an additional security step. Once you have submitted the question(s) you will be directed into the web site.' Underneath is the section 'Alternate Verification Questions' with three questions, each with a dropdown menu and an 'Answer' text box. All three questions have the text 'What was the last name of your third grad'. At the bottom right is a red 'SUBMIT' button.

After entering answers for 3 security questions, click <Submit> to continue to the next page. If you have already completed your enrollment process, you will be taken to the Dashboard which is the account summary page of the website.

**Note: If this is your first time logging in, you will be taken to the Enrollment Steps page of the website. For further information on the enrollment process see: [How do I enroll?](#)**

The Dashboard is the first screen you will be taken to each time you enter your account. Your account balance is displayed on your Dashboard.



Beneath the account balance is “My Portfolio”. This section allows you to view your balance by Investment, Asset Class and Source by using the drop down menu under “View”. Your balance may include the estimated value of pending trades. Pending trade balances will be displayed beneath the total balance

**My Portfolio**

View  
 Overview

Investment Name	Fund ID	Price	Asset Class	From My Paycheck	Balance
Vanguard Total Intl Stk Idx Ad	VTIAX	\$23.42	Foreign Large Blend	100%	1.24%   \$1,116.06
Vanguard Total Bond Mk Index A	VBTLX	\$10.79	Intermediate-Term Bond	0%	1.18%   \$1,070.61
<i>Pending trade</i>					(\$25.12)
Vanguard 500 Idx Adm	VFIAX	\$184.29	Large Blend	0%	0.13%   \$114.27
Vanguard Ext. Market Idx Adm	VEXAX	\$60.47	Mid-Cap Blend	0%	0.04%   \$34.17
Vanguard Target Retirement 202	VTTVX	\$15.44	Target-Date 2015-2029	0%	92.57%   \$83,656.22
<i>Pending trade</i>					(\$79,150.10)
Vanguard Target Retirement 203	VTHRX	\$27.28	Target-Date 2030+	0%	4.84%   \$4,371.73

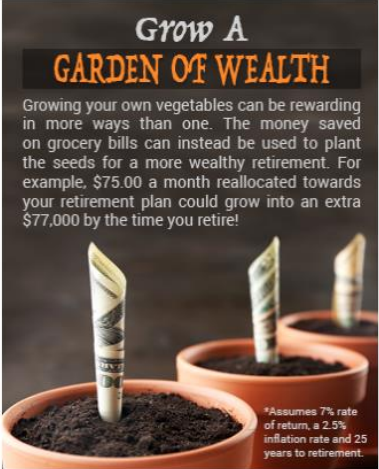
Your recent activity is summarized and displayed beneath your portfolio. This section will also give you the status of your most recent transactions.

**Recent Activity**

Date	Type	Amount	Status
02/28/16	Transfer	\$77,483.59	🕒
02/28/16	Transfer	(\$77,483.59)	🕒
02/10/16	Transfer - one sided	\$50,000.00	✅
02/10/16	Rollover	\$25,051.01	✅
08/26/15	Deferral, Pre-tax or Roth	\$75.00	✅
08/26/15	Match	\$25.00	✅
02/17/15	Transfer	\$4,195.46	✅
02/17/15	Transfer	(\$4,195.46)	✅
12/26/14	Deferral, Pre-tax or Roth	\$75.00	✅

[VIEW TRANSACTIONS](#)

**Retirement Tips**



**Grow A GARDEN OF WEALTH**

Growing your own vegetables can be rewarding in more ways than one. The money saved on grocery bills can instead be used to plant the seeds for a more wealthy retirement. For example, \$75.00 a month reallocated towards your retirement plan could grow into an extra \$77,000 by the time you retire!

\*Assumes 7% rate of return, a 2.5% inflation rate and 25 years to retirement.

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## How do I enroll?

Upon logging into the website for the first time you will be taken to the Enrollment Steps screen of the website. There are several sections that appear collapsed. You will need to expand each section in order to see the contents of that section.

Enrollment steps Print

Overall Progress: **0% Complete**

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

- > Your Personal Information
- > Email
- > Username Information
- > Security Question

### Your Personal Information

This section will be pre-populated with the personal information we have on file. Please make sure that all required fields (fields marked with an asterisk) are completed.

Enrollment steps Print

Overall Progress: **0% Complete**

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

∨ Your Personal Information

**First name \***  **Last name \***

**Birth date \***

**Street address 1 \***  **Street address 2**

**City \***  **State \***  **Zip code \***  **Country**

## Email

You can enter your email address for home, office, and/or other in this section. You will also need to confirm the email address. After you enter an email address, you will choose where you would like your emails sent. You can also select the box that says "I do not have an email address". Please note that you must either choose to receive email notifications for an email type (home, office or other) you have entered or choose "I do not have an email address" in order to proceed.

✓ Email

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

Home	Confirm home email address
<input type="text"/>	<input type="text"/>
Office	Confirm office email address
<input type="text"/>	<input type="text"/>
Other	Confirm other email address
<input type="text"/>	<input type="text"/>

Where would you like your emails sent?

Home  Office  Other  None  I do not have an email address\*

\*Note: 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.

## Username Information

You will need to enter a new username, a new password, and confirm the password.

Enrollment steps Print

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Overall Progress: **0% Complete**

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

- > Your Personal Information
- > Email
- ✓ Username Information

**Establish your Username**

**Establish your Password** Re-enter password: \*

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

## Security Questions

This section will show the answers to the security questions you set up upon login.

Security Question

<b>Security question 1</b> What was the last name of your third grade teacher?	<b>Answer 1</b> robinson
<b>Security question 2</b> Where were you when you first heard about 9/11?	<b>Answer 2</b> robinson
<b>Security question 3</b> What is your oldest sibling's birthdate (mm/dd/yyyy)?	<b>Answer 3</b> robinson

Once all sections have been reviewed you can select <Next> to go to the next step.

## Select Investments

This screen allows you to make investment elections based on the investment options your company has selected. You will need to expand each section to see the options in each section.

### Select Investments

Print

Overall Progress: **50% Complete**

The investment elections you enter below will be applied to all sources of contributions (including any employer contributions). Please note that once you have completed the enrollment process, you can always change your investment elections. For more information, please contact your plan administrator once you have completed the enrollment process.

[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. **No e-mail address on record**  
If this address is incorrect, please **correct the address in the fields provided**.

> Rules and Criteria

Security Questions

> All Sources

Investment	Current Elections	New Elections
Vanguard Total Intl Stk Idx Admiral	0.00%	<input type="text" value="0.00 %"/>
Vanguard Total Bond Mk Index Adm	0.00%	<input type="text" value="0.00 %"/>
Vanguard 500 Idx Adm	0.00%	<input type="text" value="0.00 %"/>
Vanguard Ext. Market Idx Adm	0.00%	<input type="text" value="0.00 %"/>
Vanguard Prime Money Market	0.00%	<input type="text" value="0.00 %"/>
Vanguard Target Retirement 2010	0.00%	<input type="text" value="0.00 %"/>
Vanguard Target Retirement Income	0.00%	<input type="text" value="0.00 %"/>
Vanguard Target Retirement 2015	0.00%	<input type="text" value="0.00 %"/>
Vanguard Target Retirement 2020	0.00%	<input type="text" value="0.00 %"/>

Elections must be made in increments of 1% and must add up to 100%. If you do not choose investments, your contributions will be invested in the plan's default fund. The default fund for your plan will be listed at the bottom of the screen.

TOTAL	0.00%	100.00%
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If you do not provide investment directions for your contributions, they will be defaulted to the **Vanguard Target Retirement Income** 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.

RESET TABLE

BACK NEXT

Once you have completed this screen, select <Next> to be taken to the confirmation screen.

### Confirm and Submit

The confirmation screen will show all of the information you have entered. You will need to review this information for accuracy. If you wish to change any of this information, you can do so by selecting the <Edit> option on the right.

Enrollment steps Print

Overall Progress: **66% Complete**

Confirm & Submit

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

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Personal Information Edit

Username:	333333456
First name:	Participant
Last name:	Sample
Street address 1:	212 Valley Rd
Street address 2:	
City:	Mobile
State:	AL
Zip code:	
Country:	
Date of birth:	01/01/1984
Home email address:	
Other email address:	
Office email address:	
Send email confirmation to:	None

Investment Elections Edit

All future contributions to the plan will be invested as follows:

Vanguard Prime Money Market :	50.00%
Vanguard Target Retirement 2010 :	50.00%

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

SUBMIT

Once you have confirmed everything is correct, select <Submit> at the bottom of the screen.

Enrollment steps Print

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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:

The investment elections you entered during the enrollment process will apply to all sources of contributions. For more information, please contact your plan administrator.

**GO TO PLAN**

Congratulations on a successful enrollment! Click <Go to plan> to be taken to the plan website.

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### How do I change my personal information?

You can change your personal information by clicking on the gear icon located at the top right corner of your screen.

The screenshot shows the Employee Fiduciary dashboard. At the top left is the logo with the text "EMPLOYEE FIDUCIARY". On the right, it says "Welcome, Participant Sample" with a gear icon circled in red. Below the header is a navigation menu with "Dashboard", "Manage", "Plan", "Performance", "Loans & Withdrawals", and "Forms & Reports". A "Plan Selection" dropdown is on the far right. The main content area is titled "My Dashboard" and includes a welcome message and contact information. A "Print" icon is in the bottom right corner.

Upon clicking on the gear icon, the below screen will populate. Select Personal Info. to edit your personal information.

The screenshot shows a dark grey dropdown menu. At the top, it says "Welcome, Participant G" with a gear icon and a red 'X' close button. Below this, the name "Participant G" is displayed. The menu items are "Personal Info.", "Password Change", and "Plan Selection". A red arrow points to the "Personal Info." option.