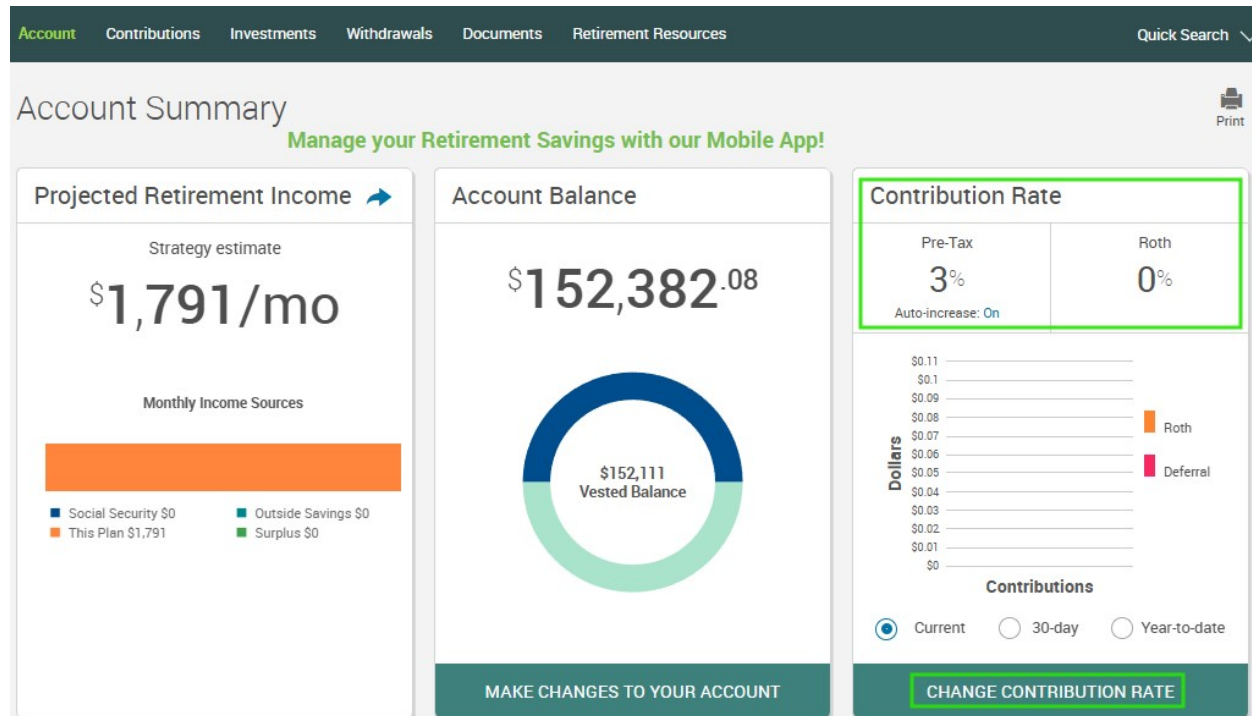




Change Participant Contribution Rate via the Website

The **Account Summary**, displays your current **Contribution Rate**.

Click **Change Contribution Rate** to change your payroll deduction amount(s).



The screenshot shows the 'Contribution Rates' page with a 'Print' icon. A red message states: 'Your contribution rate change may not be immediate. Upon submittal via the website, please contact your Human Resource Department to verify the effective date of this change.' The page is divided into two columns: 'Pre-Tax' and 'Roth'. The 'Pre-Tax' column shows a rate of '3%' with an 'Auto Increase: On' link and a green button labeled 'EDIT PRE-TAX'. The 'Roth' column is empty and has a green button labeled 'EDIT ROTH'. Below the columns is a section for 'Contribution Limits' with 'IRS Regulations:' and 'IRS Deferral Limit in 2025 - \$23,500.00'. At the bottom left is a link 'MY CONTRIBUTION CHANGES'.

Click the **EDIT PRE-TAX OR EDIT ROTH** (after tax) for the deferral type you want to change.



Change Participant Contribution Rate via the Website

On the next screen, you can **Set Contribution Rate** and/or enable **Auto Increase Contribution Rate**. Enter the required information for each option based on your preferences.

Set Contribution Rate

Select the appropriate radio button for the type of change you want to make:

- **No Changes:** Make no changes to your current contribution rate for this deferral type.
- **Stop Contributions:** Stop the contributions for this deferral type.
- **Change Contributions:** Increase or decrease your contribution rate for this deferral type.

Set Contribution Rate:

Select the appropriate radio button for the type of change you want to make **\$ Dollar Amount** * or **% Percentages**.

*Not all payroll companies allow \$ Dollar Amounts so this may not be an option.

Enter the amount you want to be deducted from your paycheck each pay period.

The screenshot shows the 'Set Contribution Rate' form. At the top, there are three radio buttons: 'No changes', 'Stop Contributions', and 'Change Contributions' (which is selected). Below this is a section titled 'Set Contribution Rate'. Inside, there are two radio buttons: '\$ Dollar Amounts' and '% Percentages (Recommended)' (which is selected). Below the radio buttons is a text input field labeled 'Pre-Tax' containing '3 %'. To the right of the input field, there is a table with the following information: Minimum: 0%, Maximum: 100%, Minimum Increment: 0.5%, and IRS Deferral Limit in 2025: \$23,500. Below the table, there are two lines of small text: '*If you are at least 50 years old by December 31st of this year, you may contribute an additional Catch-up contribution each year.' and '**If you are between the ages of 60 and 63 on December 31st of this year, you may take advantage of an increased Catch-up maximum amount.' At the bottom left is a 'CANCEL' button.

Auto Increase Contribution Rate

Complete this section if you wish to set an automatic increase in your contribution rate Semi-annually or Yearly :

To set up, turn on the option by clicking on this button

Increase my Pre-Tax contribution rate: Enter the percentage you want your contribution increased by.

Select frequency of Pre-Tax increase: Choose Yearly or Semi-annually from the drop down. Once you have made your choice for the frequency you will be prompted to enter the date(s) (MM/DD) you wish the increases to occur.

Set maximum contribution rate for Pre-Tax: Once your contribution rate reaches this maximum the automatic increases will stop.

Once you have completed the changes desired on this page, Click **NEXT**.

The screenshot shows the 'Auto Increase Contribution Rate' form. At the top, there is a toggle switch that is turned on. Below this is a section titled 'Auto Increase Contribution Rate' with a subtitle '(Complete this section to set up an automatic increase in your contribution percentage on a semi-annual or annual basis.)'. Inside the section, there are three input fields: 'Increase my Pre-Tax contribution rate by' (containing '0 %'), 'Select frequency of Pre-Tax increase' (a dropdown menu), and 'Set maximum contribution rate for Pre-Tax' (containing '0 %'). At the bottom right are two buttons: 'BACK' and 'NEXT' (which is highlighted with a green border).



Change Participant Contribution Rate via the Website

The next screen will prompt you to follow the same steps as above to **Set Contribution Rate** and/or enable **Auto Increase Contribution Rate** for each of the employee deferral types available in the plan. Enter the required information for each deferral type based on your preferences, using the instructions above. Click **NEXT** upon completion.

Review the changes submitted are correct.

If a change needs to be made click MODIFY for the deferral type you want to change. Make the changes and click **NEXT**.

Once the date is correct, click **SUBMIT**.

Change Contribution Rate - Confirm & Submit

Overall Progress: **67% Complete**

Pre-Tax	Roth
4% Deferral	4% Deferral
1%	0%
Contribution Rate Increase Frequency: Semi-annually (specify date) Contribution Rate: 10% Increase Start Date: 03/01 Date of second increase 09/01	Contribution Rate Increase Frequency: Contribution Rate: 0%

A confirmation email will be sent to: lyndag@wealthfirm.info [edit email address](#)

A **Confirmation Number** will be provided, and an email confirmation will be sent. Click **Done**.

Change Contribution Rate - Confirmation

Overall Progress: **100% Complete**

Confirmation Number 228247. Requests, while processed into the database, may not take effect immediately. Please contact your Human Resource Department to verify the effective date of this change.