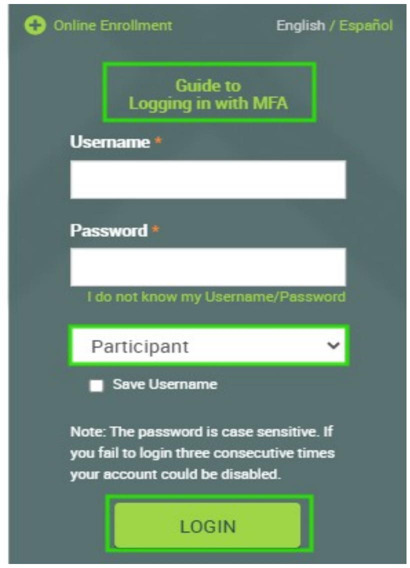
Participant Website Guide

Visit https://retirementplanconsultants.info

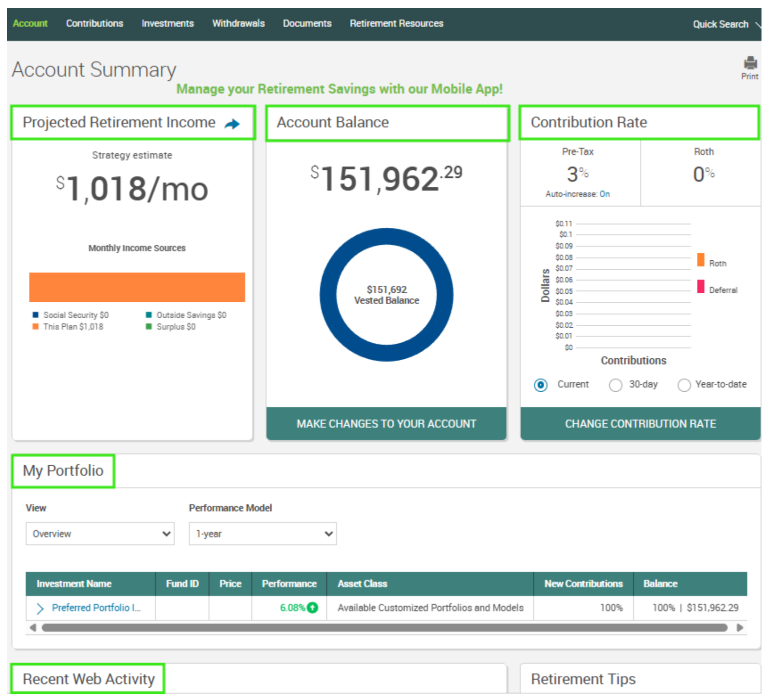


Type in your **Username** and **Password**, or follow the instructions provided in your welcome letter.

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).



Account Summary is the homepage & provides the following:

Projected Retirement Income

Account Balance

Contribution Rate

Investment Portfolio

Recent Web Activity

Descriptions of the other web menu options are provided below.

At the top right corner, you will find these three icons:

0 Displays Important Plan Messages

Provides options for Password Change and Upload a File to RPC

Log out

Go to: https://www.retirementplanconsultants.info/login
Contact RPC at 877-800-1114 for login assistance.

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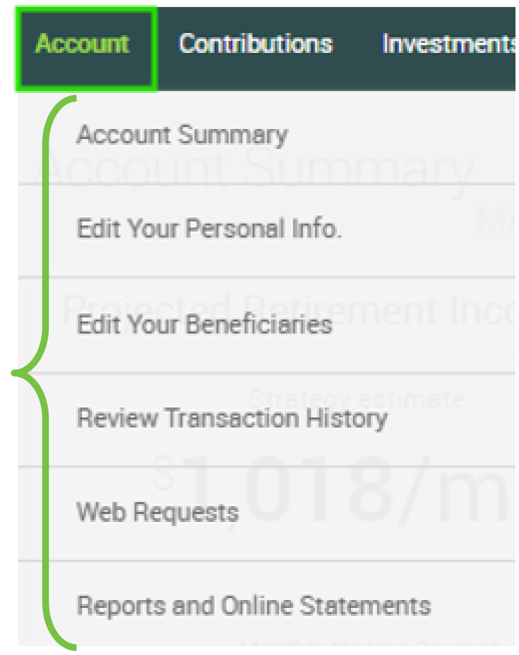
The **Resource Center** link in the upper right hand corner directs you to our Plan Participant Resource Center which has Guides to assist with the Website processes.

Account menu options:



Account Summary

Edit Your Personal Information
Edit or update your general information.

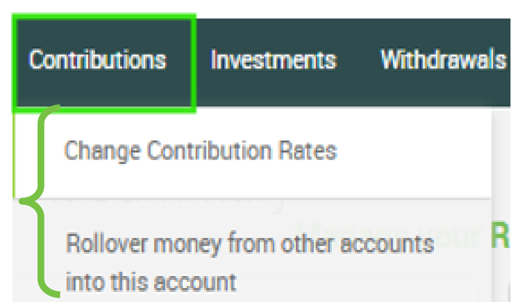
Edit Your Beneficiaries
Edit or update your beneficiaries.

Review Transaction History
View your transaction history.

Web Requests
View changes requested in your account.

Reports and Online Statements
Generate and Review Reports within your Reports Package.

Contributions menu options:



Change Contribution Rates
Make changes to the amount deducted from your paycheck.

Rollover money from other accounts into this account
In the Create Forms option Select form Rollover Exchange Request Form for Participant then GET FORM, open the form & complete.

Participant Website Guide

<u>Investments</u> menu options:

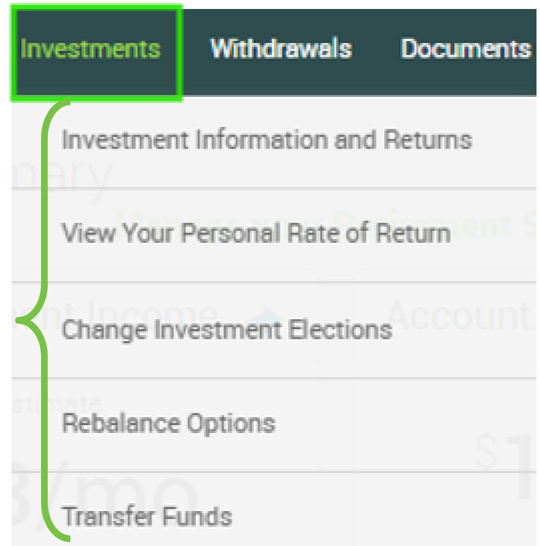
Investment Information and Returns
Investment prices are updated each business day. 1, 5, & 10 year performance is updated each calendar quarter.

View Your Personal Rate of Return
View Rate of Return percentages by specified dates.

Change Investment Elections
Change the investments your contributions are being allocated to.

Rebalance Options
Choose this options to set up Recurring Rebalance, Conform Ending Balance or Conform to Target.

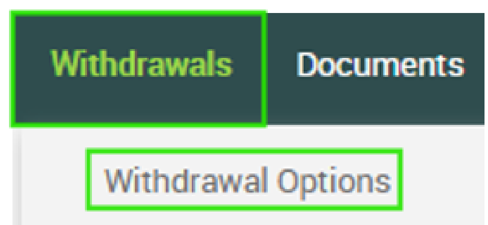
Transfer Funds
Transfer current holdings from one fund to another.



<u>Withdrawals</u>/<u>Withdrawal Options</u>:

Availability of these options depends on your specific plan's provisions.

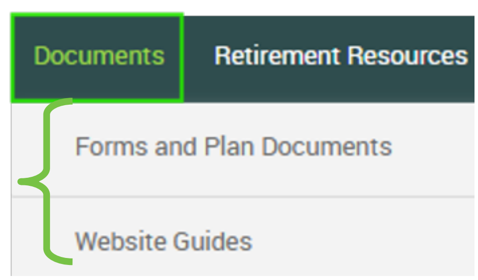
Withdrawals (In Service options)
Termination Distribution
Loans



<u>Documents</u> tab options:

Forms and Documents
Access forms & plan documents.

Website Guides
Directs you to our Plan Participant Resource Center.



Participant Website Guide

<u>Retirement Resources</u> tab options:

Retirement Calculator
Estimate your income and savings that you will have when you retire.

Other Financial Calculators
Home, Personal, Retirement, Savings, Business Finance and Tax Estimators.

Financial Education
Find relevant articles, tools and questions that have been answered by CPAs.

Investment Term Glossary
Glossary of General Investment Related Terms.