Changes to Your Managed Account Retirement Plan

Making Allocation Changes in Your Managed Account Retirement Plan

To access your retirement plan account, visit our website and click plan participant. Follow these simple steps:

1

Initial Log In

- For your initial log in, your Username is your Social Security Number and your Password will be the last four digits of your Social Security Number.
- After logging in, you will be prompted to change both your Username and Password to an alphanumeric combination of at least 8 characters in length.

2

Making Changes

- When you log into your participant account you should be greeted with the screen to the right. The first step to changing your allocation is to ensure that you are opted out of the Managed Account as seen in the example.
- Once you have verified that you are opted out of the Managed Account, select **Manage Investments**.
- Once you have verified that you are opted out of the Managed Account, select **Account Information**, then select **Manage Investments.**
- Select **Change Elections** to make changes to your current allocations and to perform a single rebalance for your account.
- In the far right hand column labeled **New Election**, place the new percentages you would like for the funds you are making changes to. If you have chosen an **"Asset Model Portfolio"** place 100% into this column. If you are choosing individual funds select and divide the percentages between the funds you wish to invest in.
- Select **Next** when your total equals 100%.
- Choose whether you would like to rebalance your account or not. By choosing to rebalance your account you are aligning your fund percentages to match the allocations you selected on the prior screen.
- On this screen you have the opportunity to read the prospectus for each fund. To read the prospectus click **"view prospectus"** for that fund.
- Click **Next** to continue.

3

Review

- Review the allocations you have selected.
- Click **Next** to continue your transaction.
- If you need to make changes to this transaction click **Back.**
- Your transaction is now complete. A confirmation number has been provided as a reference for this transaction. Your changes are not recorded until you receive a confirmation number.

Need help? Contact your plan administrator or speak to a Retirement Service representative by phone at (888) 755-3039 or by emailing RetirementServices@worksaveretire.com. Representatives available Monday-Friday from 8:00am- 8:00pm EST.