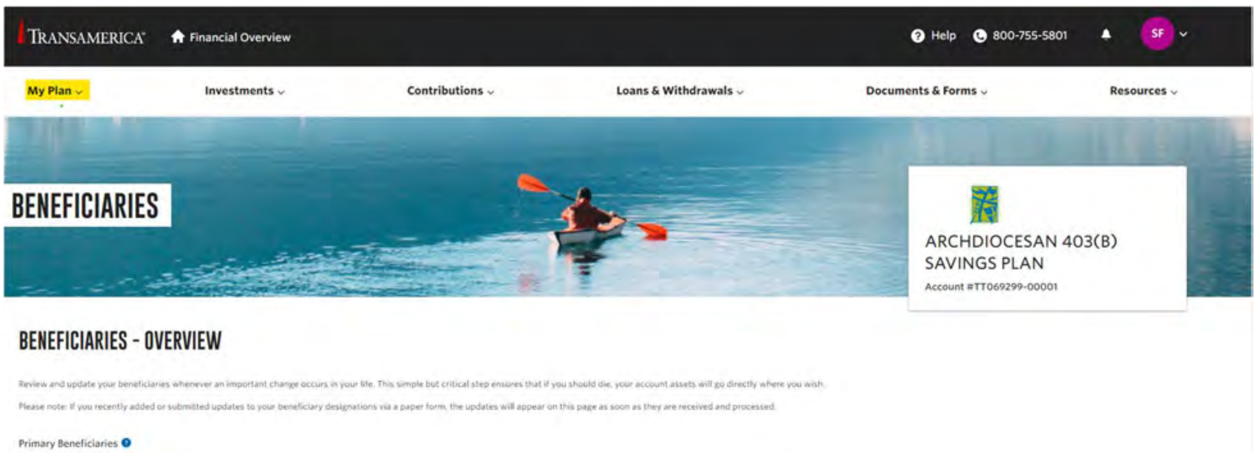
After setting up your login credentials you will be on your personal dashboard. Select DETAILS of the plan you want to view. Across the top is a list of accessible information and forms. To change plans click Financial Overview at the top of the screen.

Some of the frequently used options are **Contributions** and **Withdrawals**. Which can be initiated by clicking on the dropdown menu.

On the My Plan tab you will see the main topics Account Overview, Activity Summary and Details, Beneficiaries, Rollovers, Balance, and Summary Plan Documents.

Select Beneficiaries to set up your beneficiaries. If you are updating your beneficiaries, scroll to the bottom of the page and click the ADD/UPDATE button and select the change you are wanting on each beneficiary; Edit, Delete or Make Contingent. **Be sure to click Submit when done.**



On the Documents & Forms tab you will find various forms to choose from. Select **Contributions** for the <u>Incoming Rollover Request</u> form needed to rollover your account from a previous employer. Select **Distributions** to view the options available to participants.