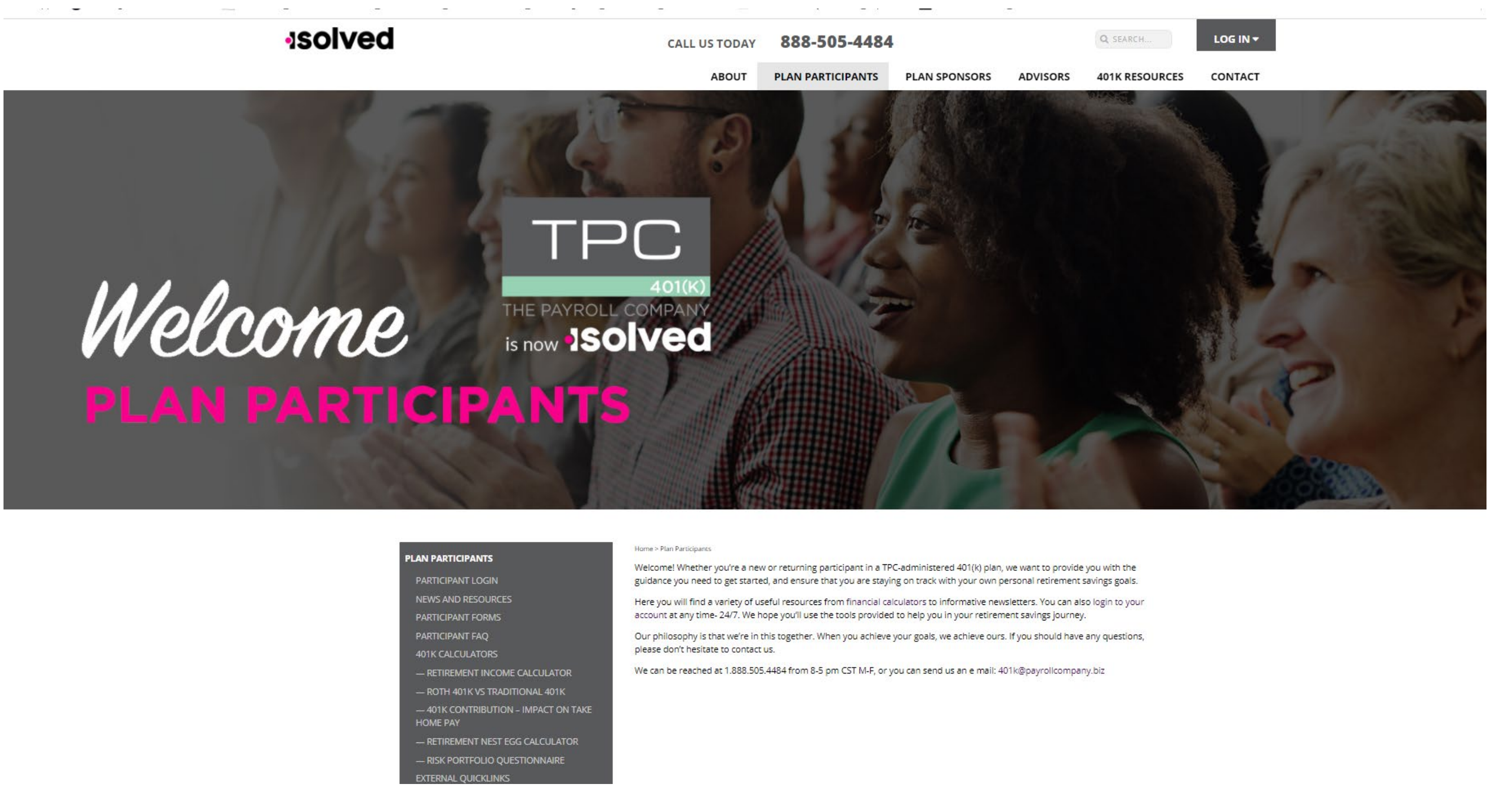
iSolved 401(k) Web User Manual

First Time Log In

To enroll into the plan for the first time follow these steps:

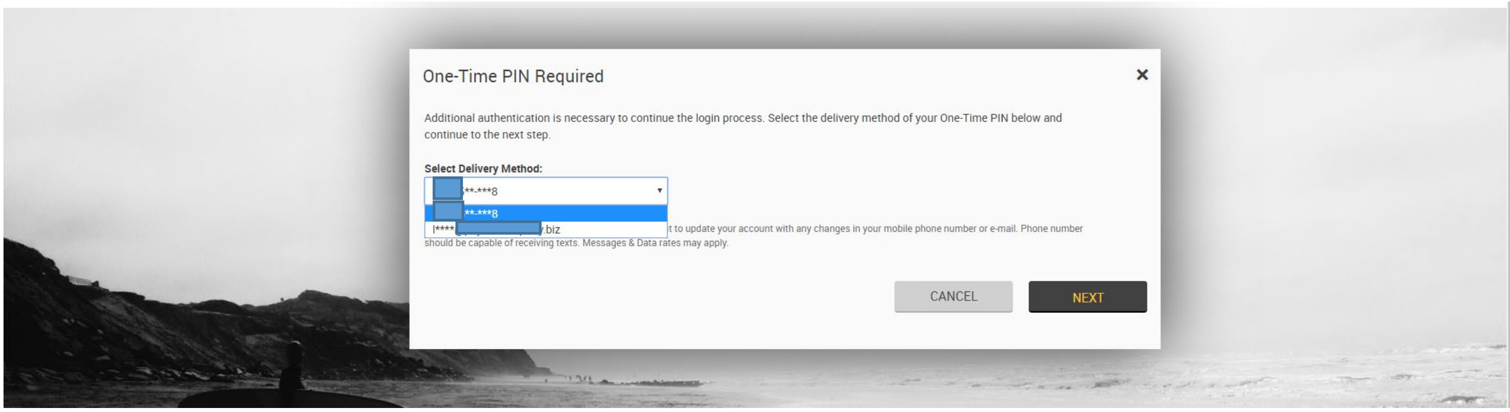
1. Access www.my401kdata.com
2. Select “Participant Login” under the Participants Tab
3. Enter your social security numberwithout dashes as your user name.
4. Enter the last 4 digits of your social security number as your password.
5. Select Role = Participant
6. Login

You should change your user name and password after you first log in.

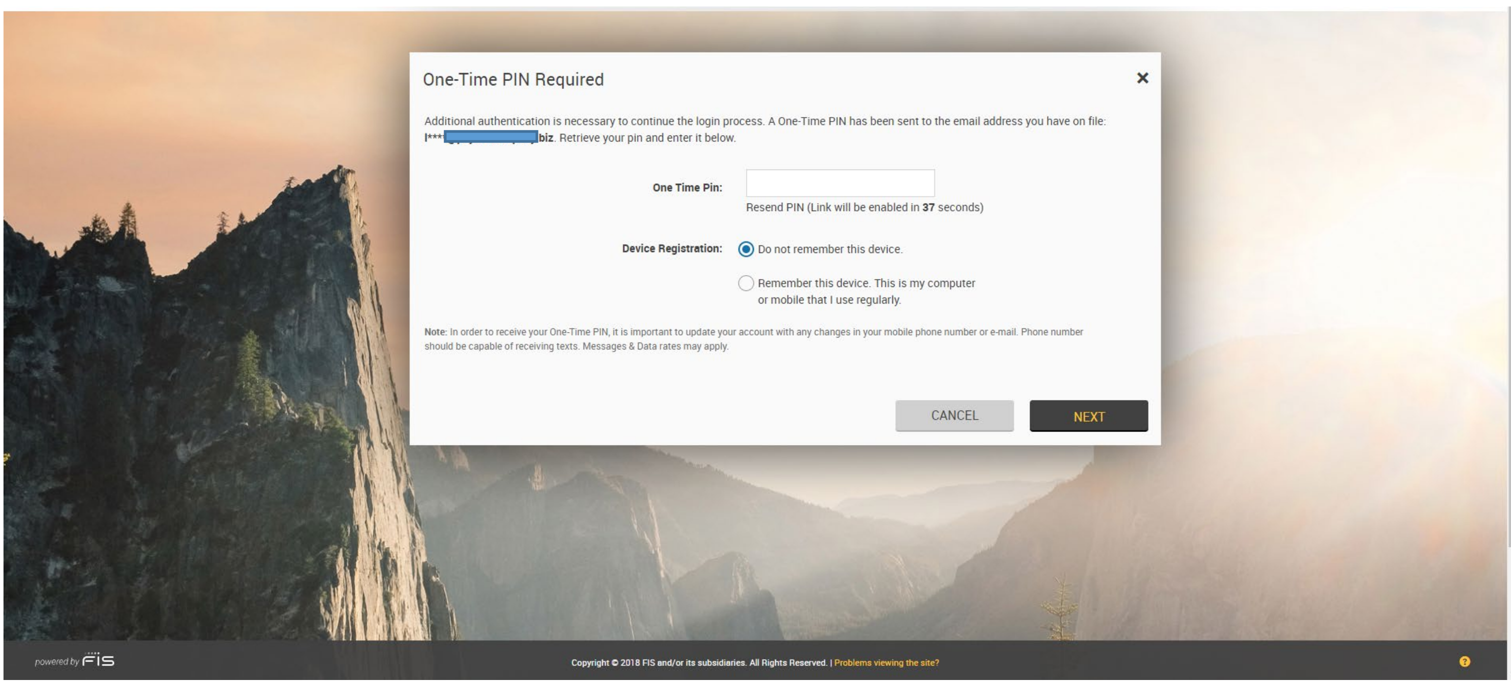


Please keep record of User ID and password for future access to your retirement account. Please contact iSolved 401(k) at (888)505-4484 or 401kservice@isolvedhcm.com if you need a Password reset.

If you have BOTH an email address and phone number on file with us, you will be asked to pick the device to receive the one time pin on, choose the preferred method and click Next



Once you have selected your device, or if you only have one device on file with us, you will receive the below prompt to enter the One Time Pin that has been sent.



If you do not have an email or phone number on file, you will need to call our participant line at 888-505-4484 to have one generated on your behalf.

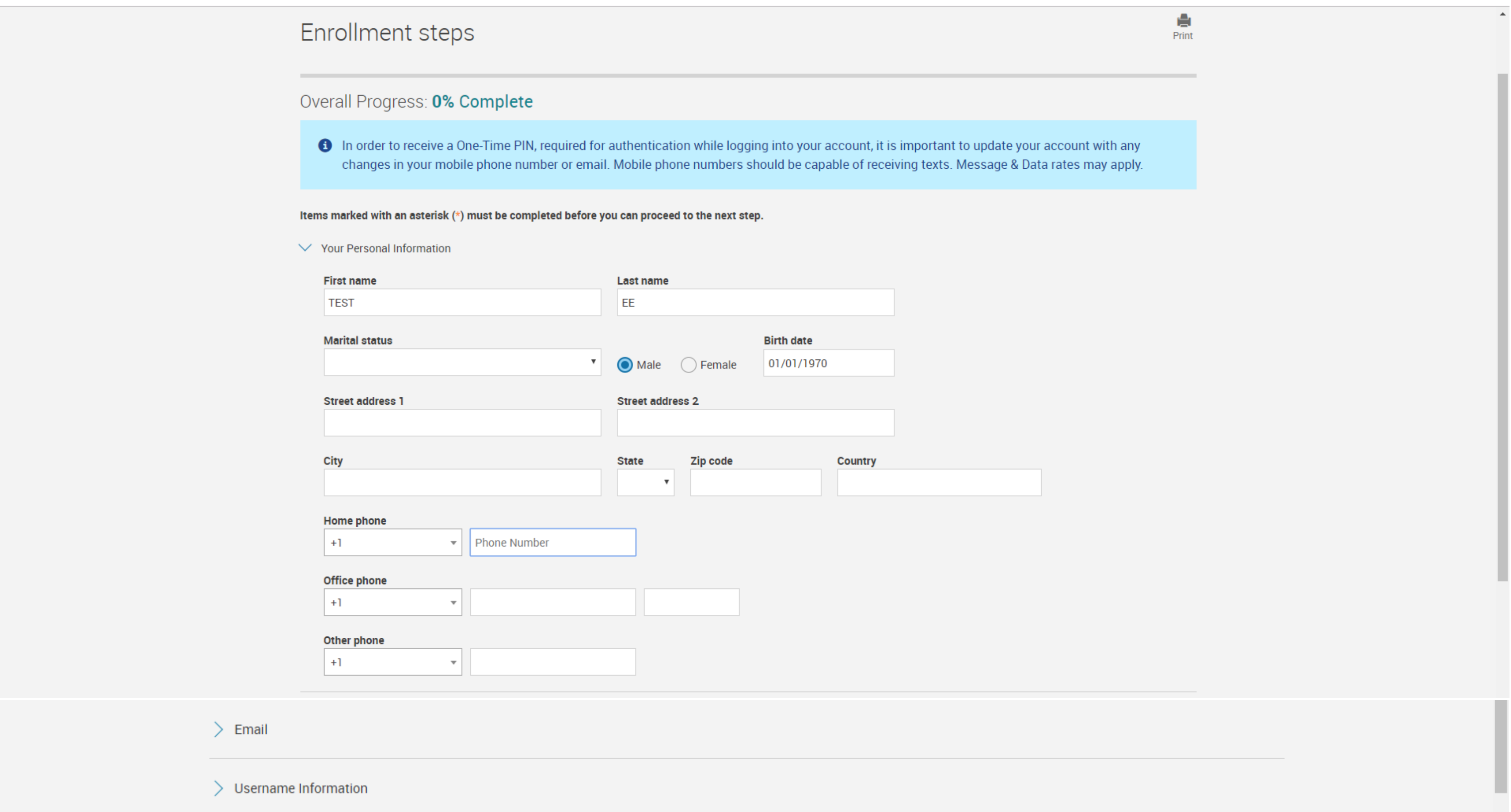
Once you have received the Pin – enter it in the One Time Pin field and click Next. If you also elect to choose to have the website remember your device, any subsequent logins will need to be made from the redirect login page: www.benefitwebaccess.com/tpc401k

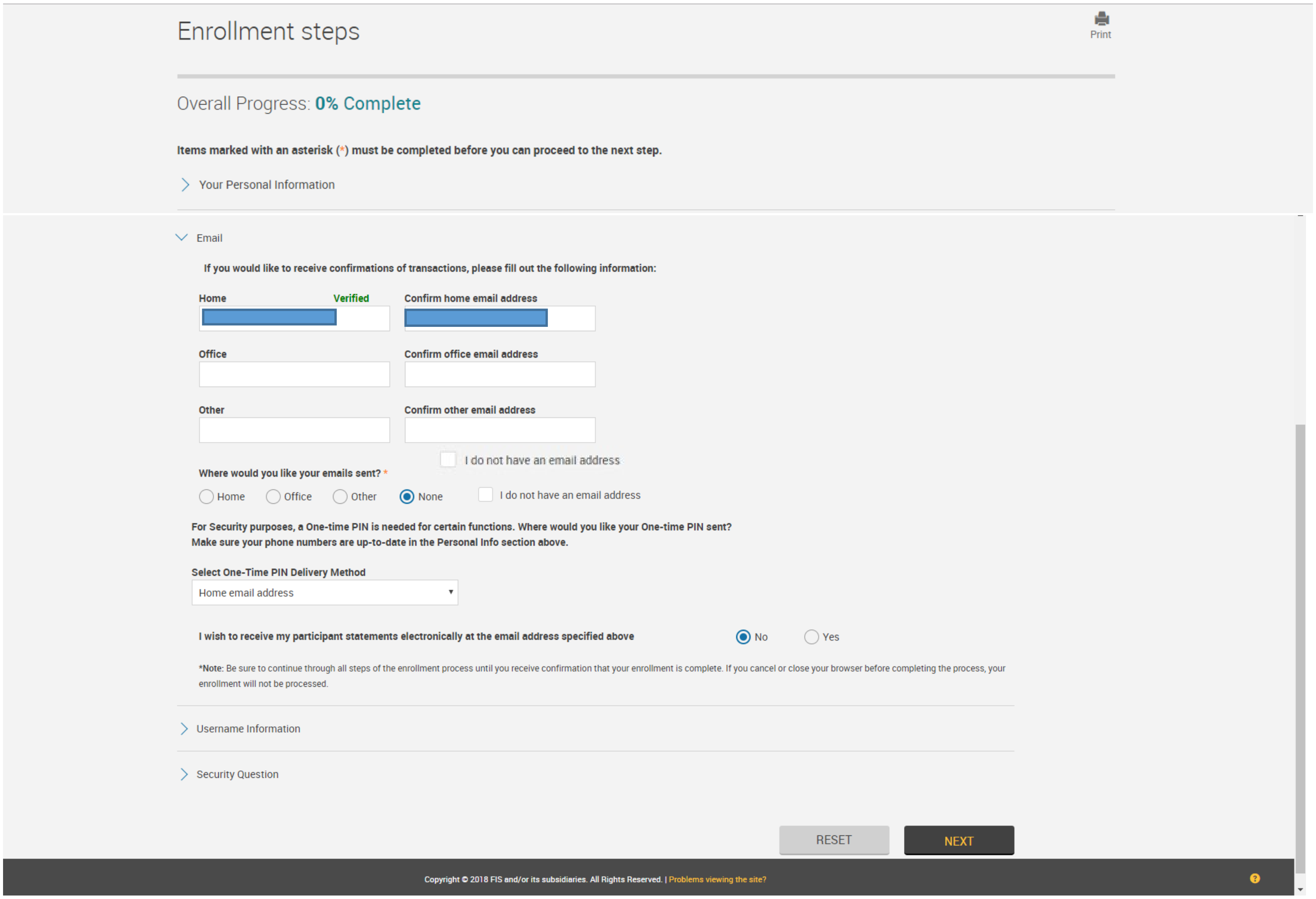
Personal Information

Upon logging in you will be prompted to complete the 5 enrollment steps.

Step 1. Personal Information

- Verify your personal information is accurate and provide a phone number if one is not currently on file
- Enter your email address or additional email addresses you would like on file, indicate which you would like email communications sent to
- Indicate what device you would like one-time pins sent to as a default going forward
- Select a new user name and password
- Choose a verification question and answer for security purposes




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
If you would like to receive confirmations of transactions, please fill out the following information:
Home
Verified
Confirm home email address
Office
Confirm office email address
Other
Confirm other email address
I do not have an email address
Where would you like your emails sent? *
Home
Office
Other
None
I do not have an email address
For Security purposes, a One-time PIN is needed for certain functions. Where would you like your One-time PIN sent?
Make sure your phone numbers are up-to-date in the Personal Info section above.
Select One-Time PIN Delivery Method
Home email address
I wish to receive my participant statements electronically at the email address specified above
No
Yes
*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
Security Question
RESET
NEXT
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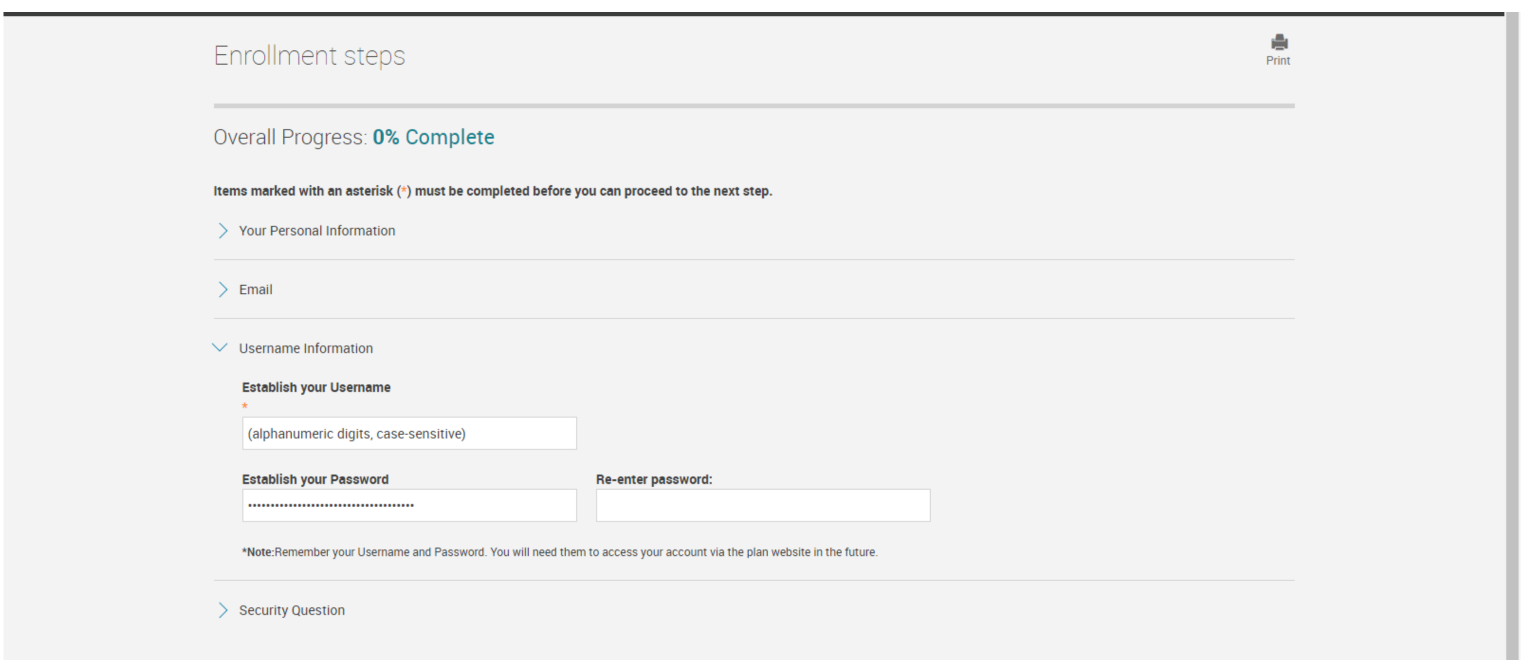
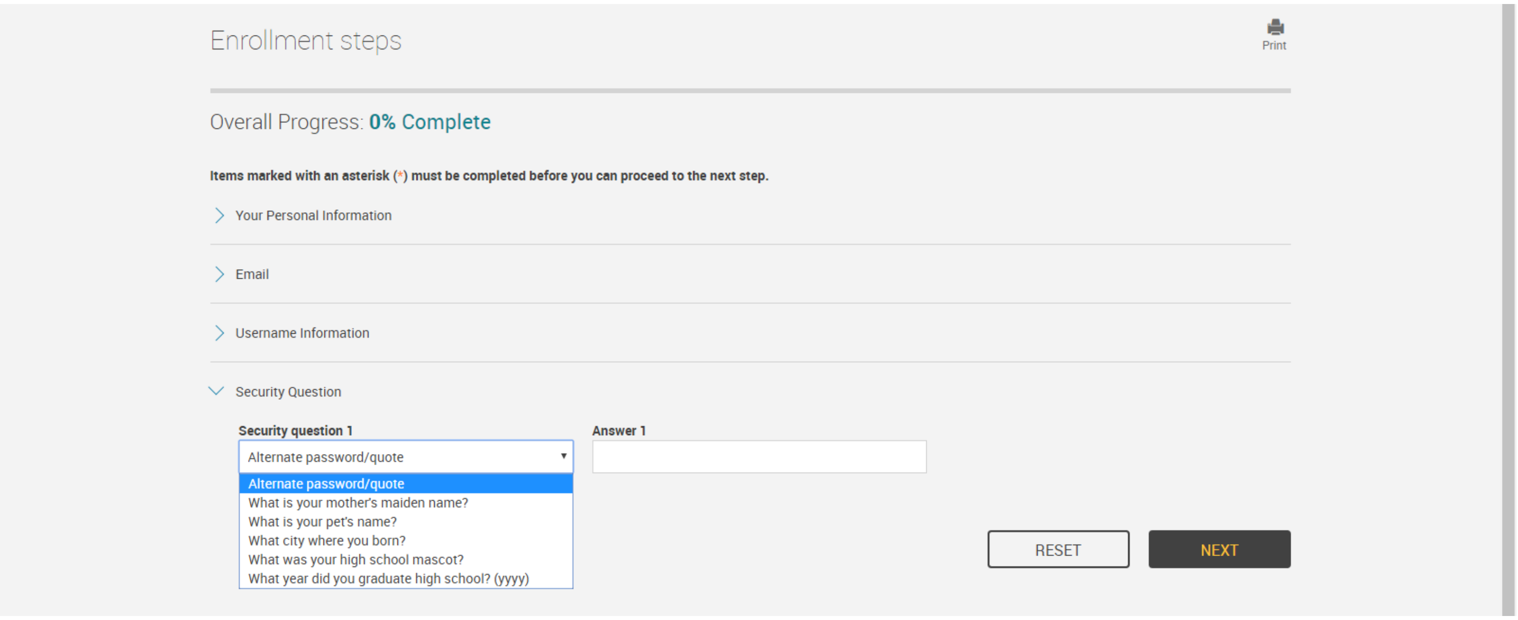

Enrollment steps
Print
Overall Progress: 0% Complete
Items marked with an asterisk (*) must be completed before you can proceed to the next step.
Your Personal Information
Email
Username Information
Establish your Username
*
(alphanumeric digits, case-sensitive)
Establish your Password
Re-enter password:
*Note:Remember your Username and Password. You will need them to access your account via the plan website in the future.
Security Question



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

Security question 1

Alternate password/quote

Alternate password/quote
What is your mother's maiden name?
What is your pet's name?
What city where you born?
What was your high school mascot?
What year did you graduate high school? (yyyy)

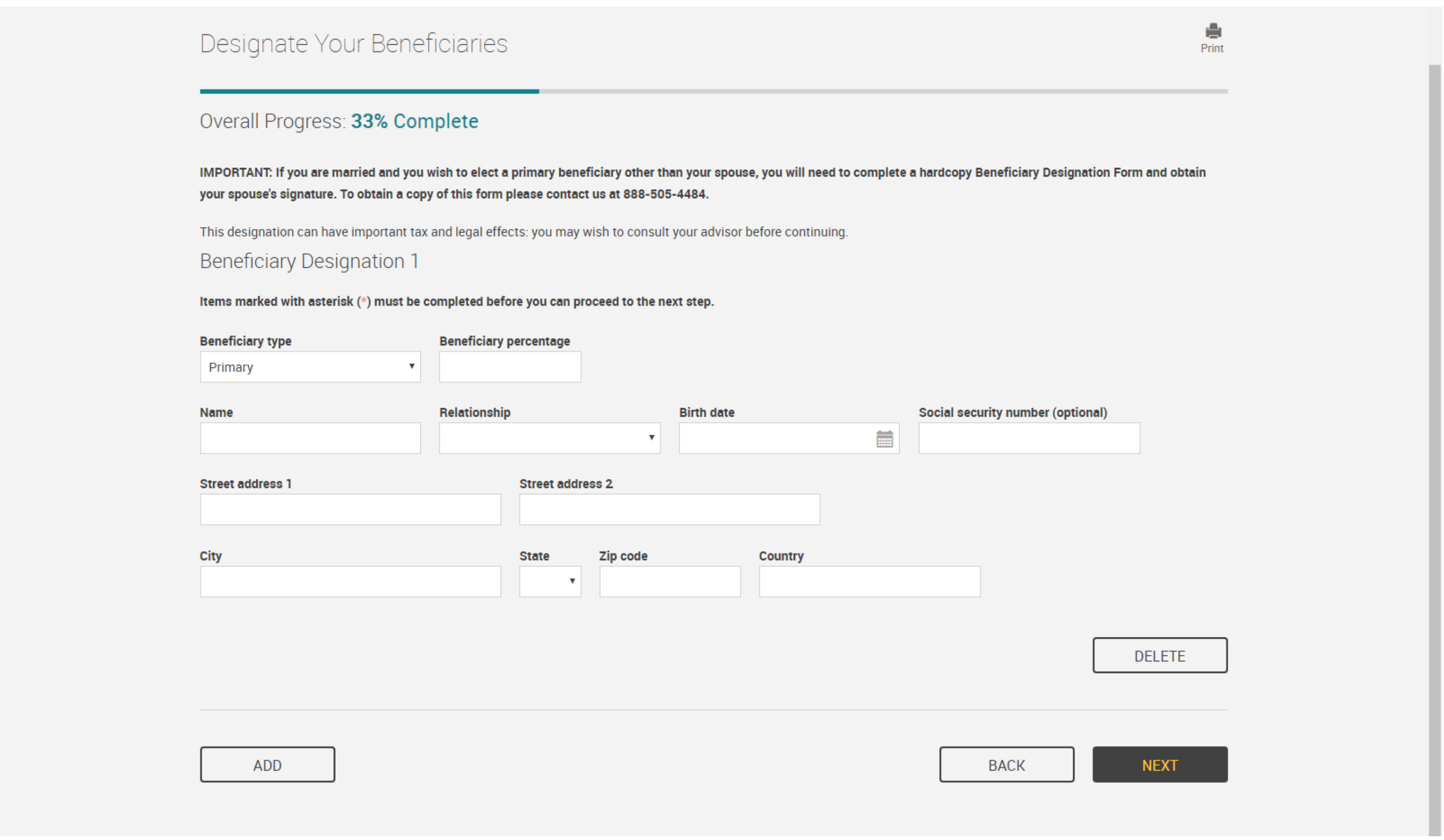
Answer 1

RESET NEXT

Click Next

Step 2. Beneficiaries

- Update your beneficiary information (it is not required to complete this step during the enrollment process.)
- Click "ADD" to add additional Beneficiaries. When all are added, click Next.



Designate Your Beneficiaries

Print

Overall Progress: **33% Complete**

IMPORTANT: If you are married and you wish to elect a primary beneficiary other than your spouse, you will need to complete a hardcopy Beneficiary Designation Form and obtain your spouse's signature. To obtain a copy of this form please contact us at 888-505-4484.

This designation can have important tax and legal effects: you may wish to consult your advisor before continuing.

Beneficiary Designation 1

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

Beneficiary type Primary

Beneficiary percentage

Name **Relationship** **Birth date** **Social security number (optional)**

Street address 1 **Street address 2**

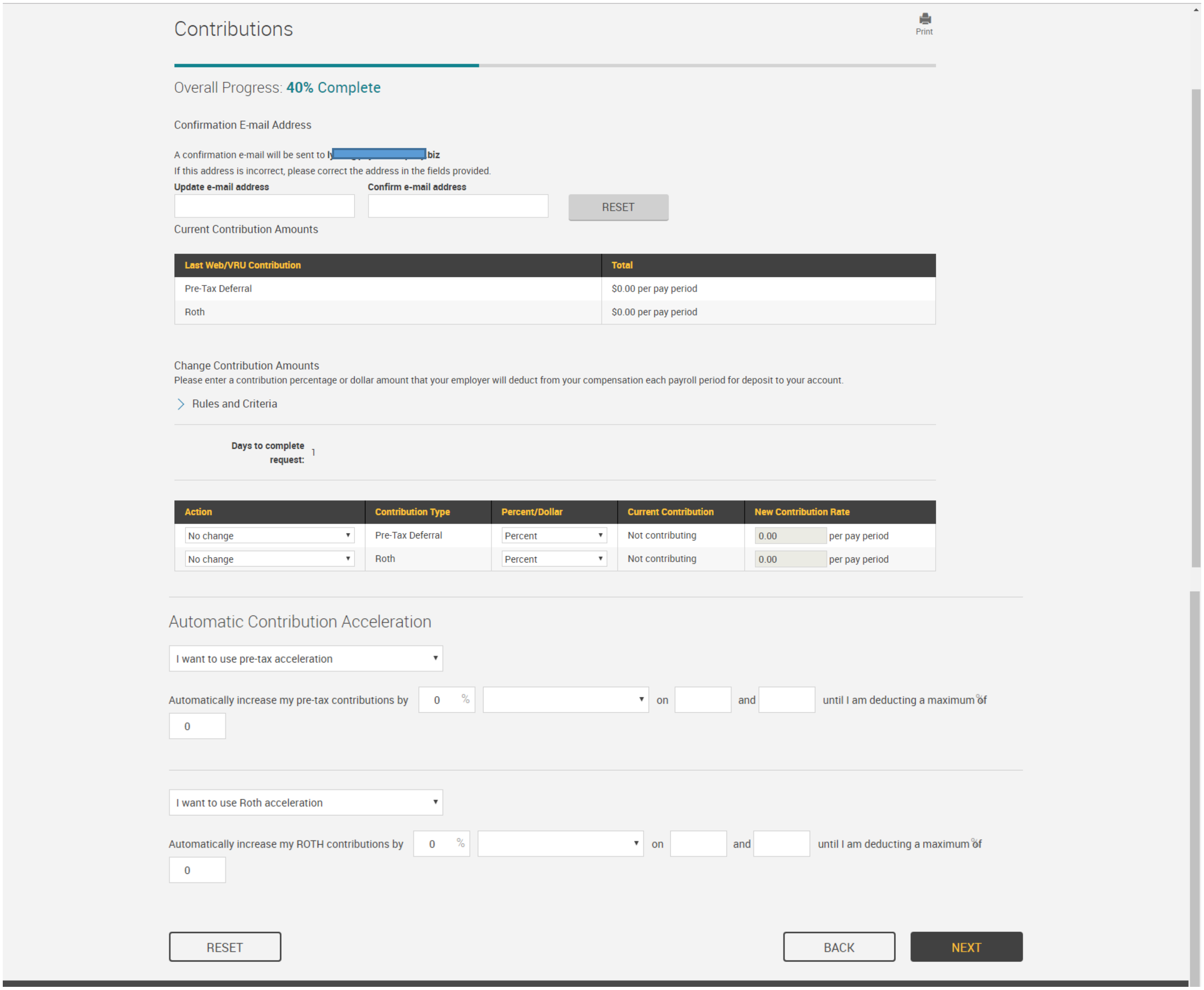
City **State** **Zip code** **Country**

DELETE

ADD BACK NEXT

Step 3. Contributions

- Do not update or reset email address on this screen
- Scroll to the bottom of the Contributions screen and make an election under Action
- Make a select under the drop down from each menu bar and hit next
- Make an election regarding Automatic Contribution Acceleration if applicable



Click Next

Step 4. Investment Election

- Do not update or reset email address on this screen
- Enter the desired percentage - The total allocation percent must equal 100%. The Investment Portfolios are listed first.

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. [redacted]biz
If this address is incorrect, please correct the address in the fields provided.

Update e-mail address: **Confirm e-mail address:**

RESET

Rules and Criteria

All Sources

Investment		Asset Class	Current Elections	New Elections
Aggressive	details	Investment Product	0.00%	0.00 %
Conservative	details	Investment Product	0.00%	0.00 %
Highly Aggressive	details	Investment Product	0.00%	0.00 %
Moderate	details	Investment Product	0.00%	0.00 %
Risk Averse	details	Investment Product	0.00%	0.00 %
Vanguard Federal Money Market Fund Inves	details	Money Market-Taxable	0.00%	0.00 %
DFA Inflation-Protected Securities Portf	details	Inflation-Protected Bond	0.00%	0.00 %
Vanguard Short-Term Inflation-Protected	details	Inflation-Protected Bond	0.00%	0.00 %
DFA Five-Year Global Fixed Income Portfo	details	World Bond	0.00%	0.00 %
DFA International Real Estate Securities	details	Global Real Estate	0.00%	0.00 %
DFA U.S. Large Cap Growth Portfolio Inst	details	Large Growth	0.00%	0.00 %
DFA U.S. Small Cap Growth Portfolio Inst	details	Small Growth	0.00%	0.00 %
Vanguard 500 Index Fund Admiral Shares	details	Large Blend	0.00%	0.00 %
DFA U.S. Large Cap Value III Portfolio	details	Large Value	0.00%	0.00 %
DFA Emerging Markets Core Equity Portfol	details	Diversified Emerging Mkts	0.00%	0.00 %
DFA Large Cap International Portfolio In	details	Foreign Large Blend	0.00%	0.00 %
DFA International Small Company Portfoli	details	Foreign Small/Mid Blend	0.00%	0.00 %
Vanguard Mid-Cap Growth Index Fund Admir	details	Mid-Cap Growth	0.00%	0.00 %
Vanguard Real Estate Index Fund Admiral	details	Real Estate	0.00%	0.00 %
DFA U.S. Targeted Value Portfolio Instit	details	Small Value	0.00%	0.00 %
TOTAL			0.00%	0.00%

If you do not provide investment directions for your contributions, they will be defaulted to the Moderate 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.

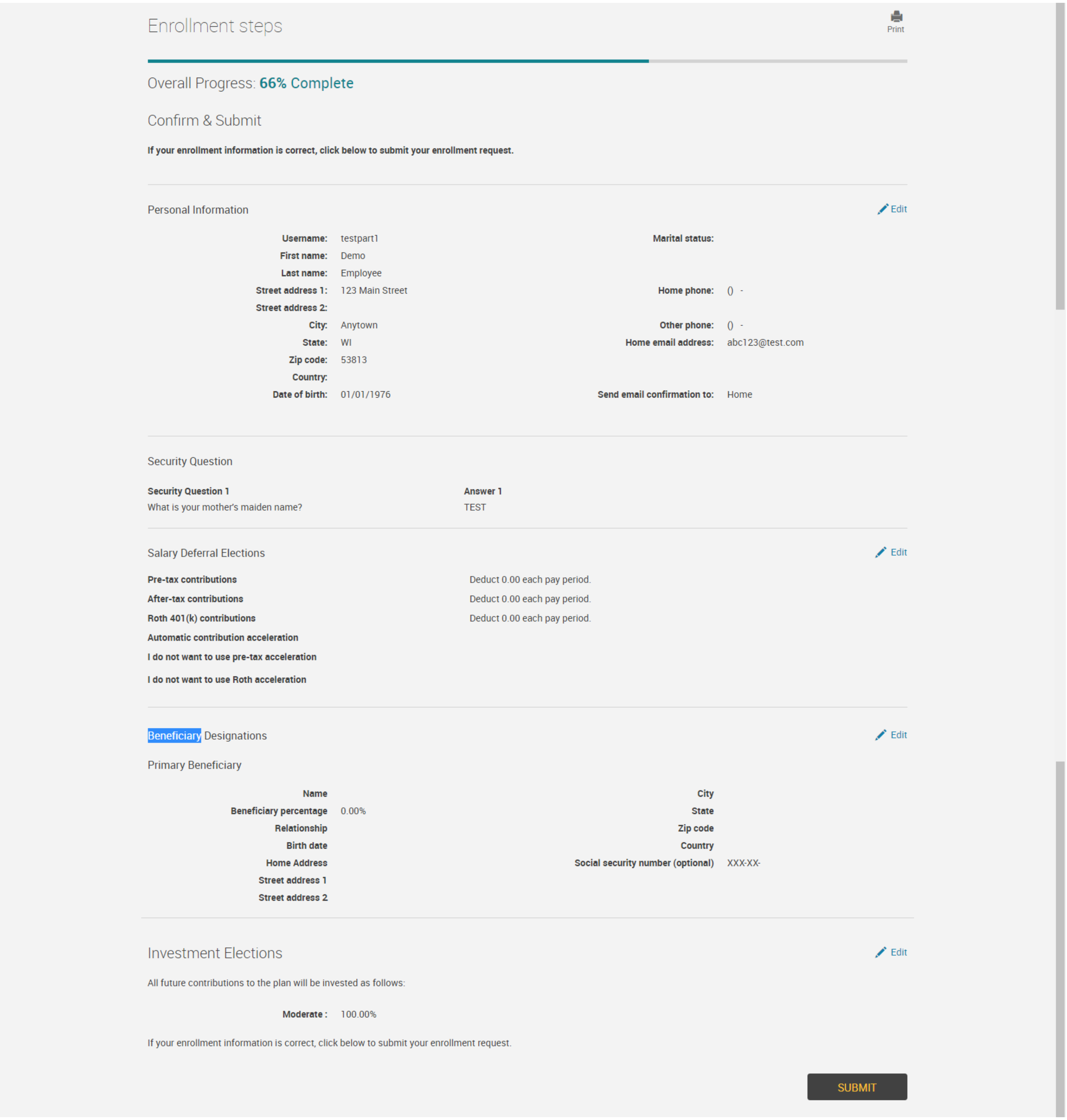
RESET TABLE

BACK NEXT

Click Next

Step 5. Confirmation

- Review your Enrollment information
- Click “Submit”
- You will receive a confirmation number if completed


Enrollment steps

Print

Overall Progress: **66% Complete**

Confirm & Submit

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

Personal Information

Edit

Username:	testpart1	**Marital status:**	
First name:	Demo		
Last name:	Employee		
Street address 1:	123 Main Street	**Home phone:**	() -
Street address 2:			
City:	Anytown	**Other phone:**	() -
State:	WI	**Home email address:**	abc123@test.com
Zip code:	53813		
Country:			
Date of birth:	01/01/1976	**Send email confirmation to:**	Home

Security Question

Security Question 1	**Answer 1**
What is your mother's maiden name?	TEST

Salary Deferral Elections

Edit

Pre-tax contributions	Deduct 0.00 each pay period.
After-tax contributions	Deduct 0.00 each pay period.
Roth 401(k) contributions	Deduct 0.00 each pay period.
Automatic contribution acceleration	
I do not want to use pre-tax acceleration	
I do not want to use Roth acceleration	

Beneficiary Designations

Edit

Primary Beneficiary

Name		**City**	
Beneficiary percentage	0.00%	**State**	
Relationship		**Zip code**	
Birth date		**Country**	
Home Address		**Social security number (optional)**	XXX-XX-
Street address 1			
Street address 2			

Investment Elections

Edit

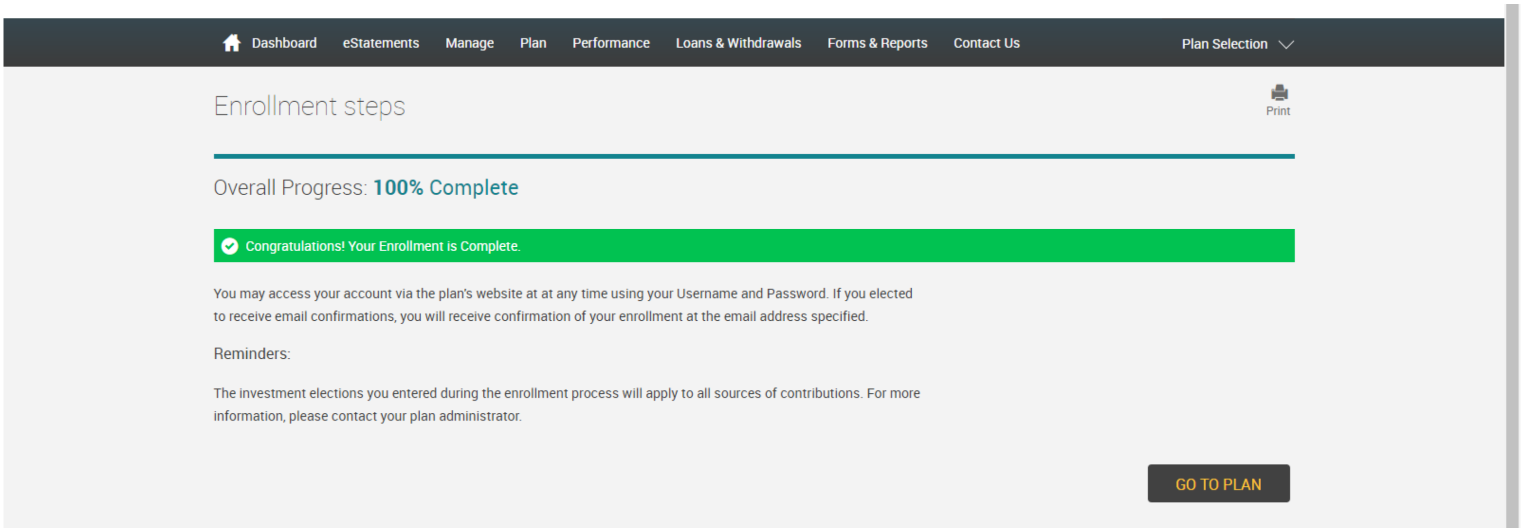
All future contributions to the plan will be invested as follows:

Moderate : 100.00%

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

SUBMIT

Upon completion of the enrollment process, a final screen will confirm your enrollment and allow you to click “Go To Plan” to access the plan website.

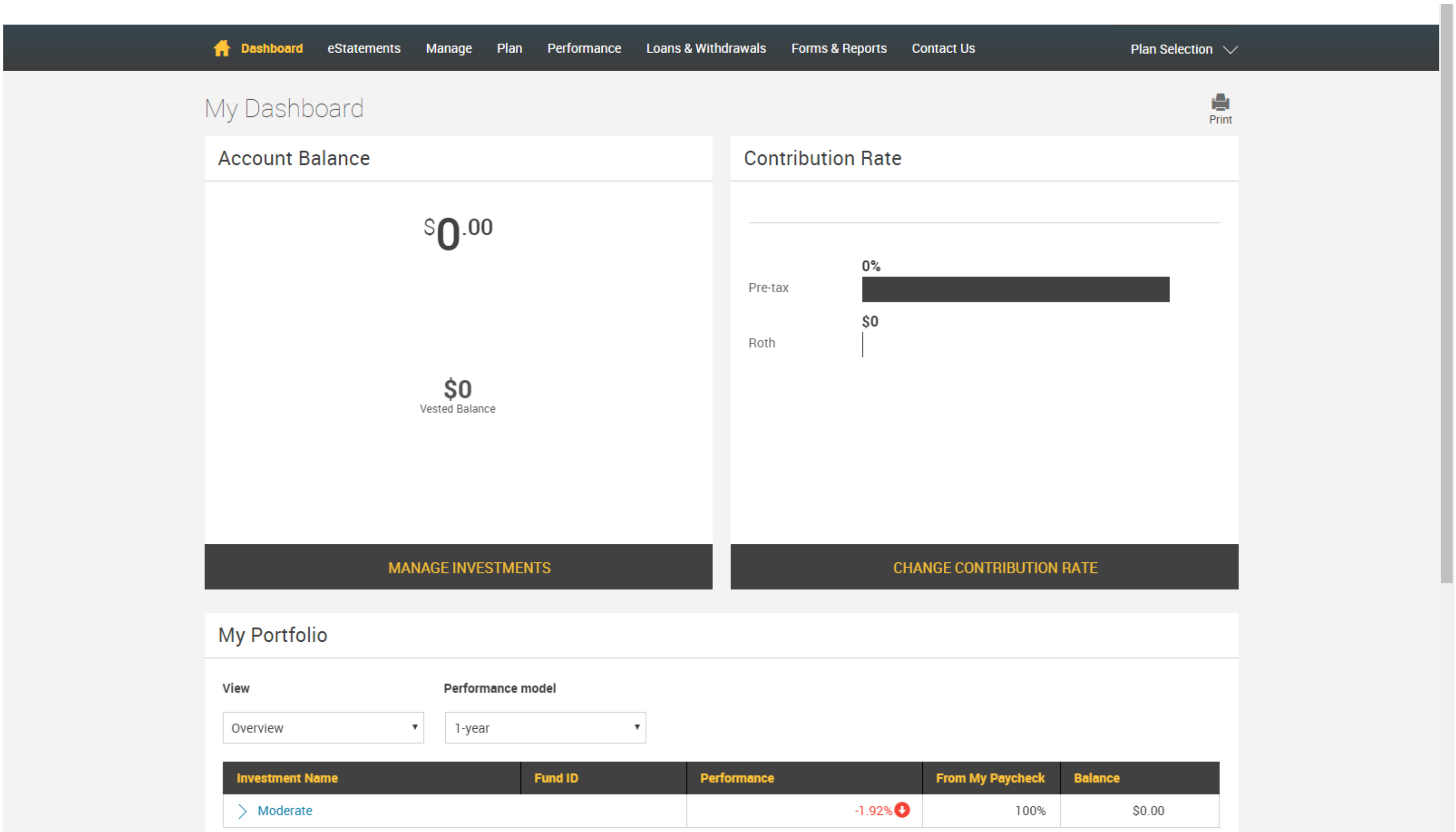


If there are any important messages about your plan, it will be signified by this symbol in the upper right hand corner of your screen - Click on this symbol to review. These notices should be reviewed and cleared after reviewing

To update either your personal information, beneficiary info or user id/password, click on this symbol in the upper right hand corner of your screen

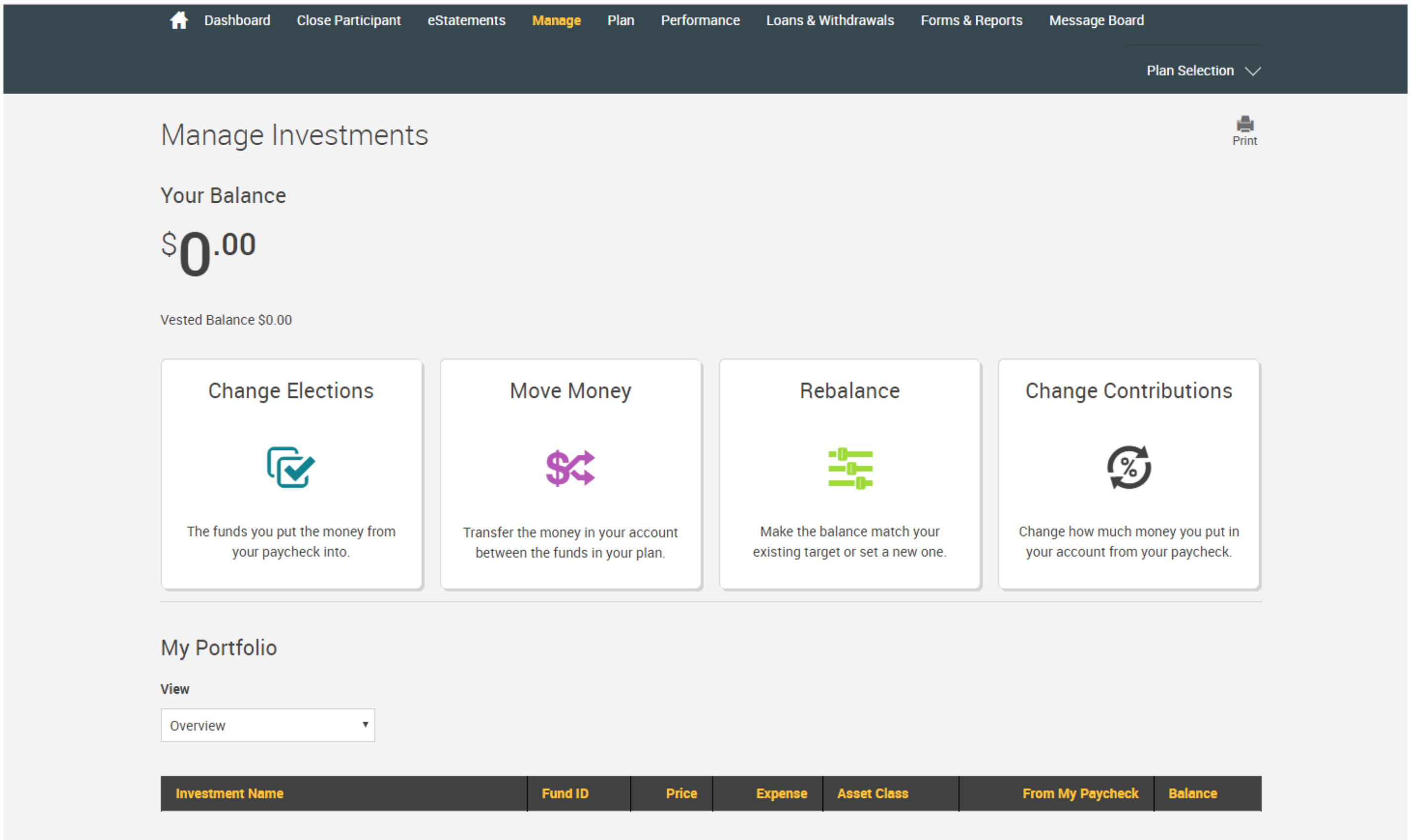
To log off the website, click on this symbol in the upper right hand corner of your screen

Dashboard Tab – will provide an overview of your account



Manage Tab – Manage Investments – to select one of these actions, click the box of the applicable topic

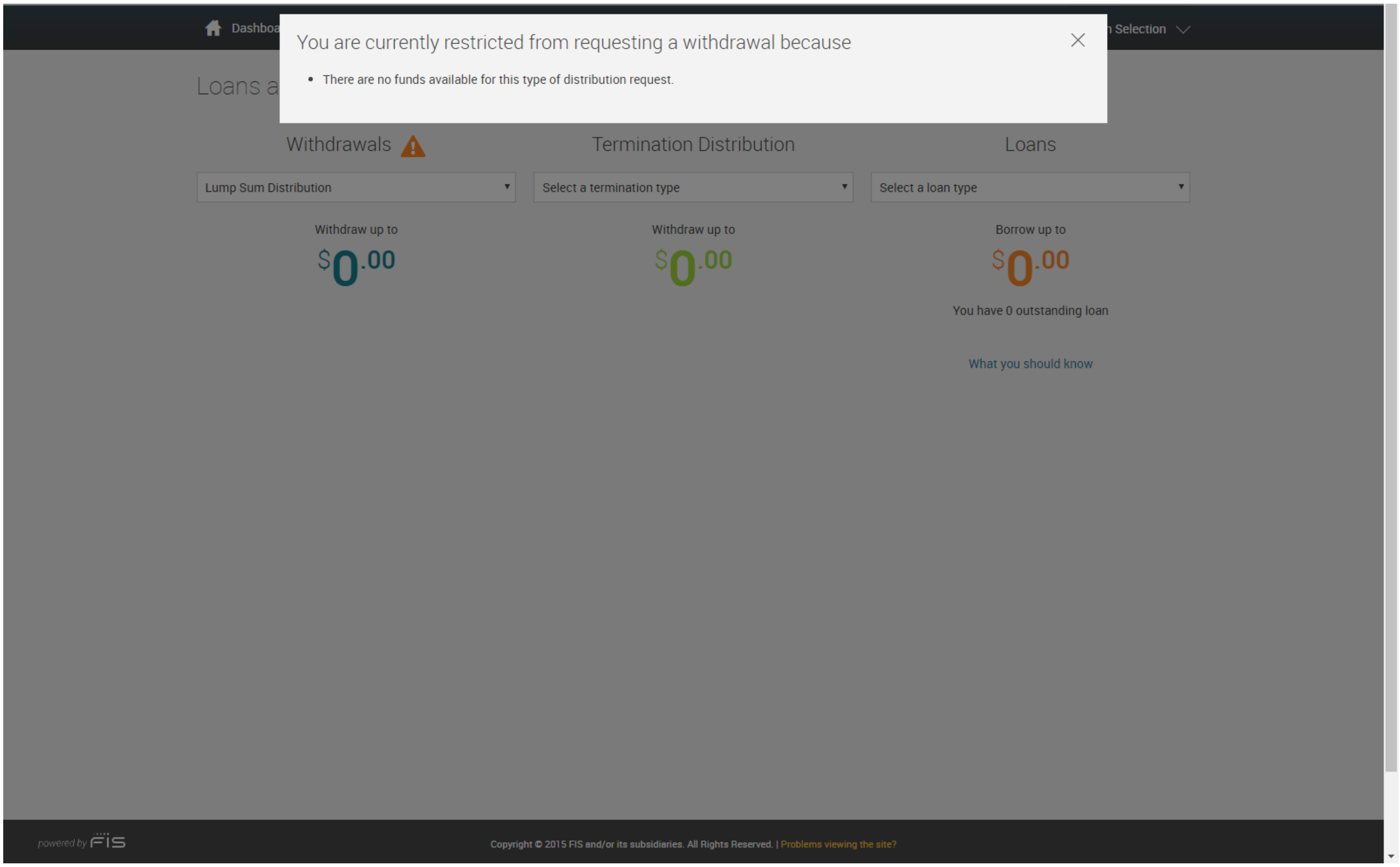
When making ANY change, ensure you receive a Confirmation banner with a Confirmation number to ensure the change has been accepted.



Loans & Withdrawals Tab – this tab will allow you to initiate an Inservice Withdrawal, Termination Distribution or a Loan – if any of these are allowed on your plan (or allowed to be initiated via the web).

When requesting ANY type of transaction, ensure you receive a Confirmation banner with a Confirmation number to ensure the change has been accepted.

If a transaction is allowed by the plan but you aren't currently eligible, click on the  for a description of why you aren't eligible for that transaction type.



Quick Reference Guide

Web Tabs

eStatements Tab – this tab will open a screen that will list up to your 4 most recent quarterly statements – click on each link separately to access the applicable statement

Plan Tab – this tab has the Retirement Calculator

Performance Tab – Rate of Return – will show your personal rate of return on a specific investment

Performance Tab – Investment Returns – shows the historical performance of the investments within the plan

Forms & Reports Tab – Reports – this is where you can elect to only receive electronic statements or both electronic and hardcopy via mail.

Forms & Reports Tab – Forms – this tab is where all of the participant forms and required notices are located (ie: Distribution at Termination form, Rollover In Form, Annual Notices, etc)