

## **Access Plan Forms and Documents for Enrolling Employees**

## Visit <u>https://retirementplanconsultants.info/login/</u>

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

Select role from dropdown menu: Sponsor

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).

	Guid Logging in	e to with MFA	1	
Userna	ame *			
			0	
Passw	vord *			
l do i	not know my l	Jsemame/Pa	assword	
Spo	onsor		~	
<u> </u>	Save Usernam	e		
Note: T you fail your ac	he password i to login three count could b	s case sensi consecutive e disabled.	tive. If times	
	1.00	SIN	1	

When enrolling employees, plan forms and documents can be accessed online and downloaded for open enrollments, etc. To run your plan specific documents, click the Forms, Documents and Reports tab and select Forms and Documents off the dropdown menu.

🚹 Sponsor Dashboard	Plan Information	Manage Your Plan	Submit Payroll Contributions	Forms, Documents and Reports
Summary				Forms and Documents
Carrinnary				Reports

	Plan Sponsor and Participant Forms						
Choose <b>Generate Forms</b> off the dropdown list if not already shown and click the <b>Online</b> <b>Enrollment Flyer</b> in the Form Selection section shown and click the	Operational Plan Sponsor Forms may be obtained by clicking HERE. Operational Participant Forms may be obtained by clicking HERE. Enrollment Forms and Online Enrollment Flyers may be generated below.  Forms and Documents Generate Forms Select form group None						
Submit button.	Form Selection	Options					
	Beneficiary Designation Form To be completed by participant & sent to RPC. **Must use paper form when Spousal Consent required	Divisions	Select employee All Employees				
	Enrollment Form To be completed by participant & sent to RPC for account setup Online Enrollment Elver	Select export file type					
	Generate an online enrollment flyer with your plan specific password, to provide new employees.		SUBMIT				



Plan Sponsor and Participant Forms				🚔 Print	
Operational Plan Sponsor Forms may be obtained by clicking HER	E. Operational Participant Forms	may be obtain	ed by clicking HERE.		
Enrollment Forms and Online Enroll	ment Flyers may be generated be	low.			
Acobe Reader					
Forms and Documents					Choose <b>View</b>
Generate Forms					Documents off the
Generate Forms					drondown list if not
View Documents					
None					already shown.
Form Selection	Options				
Beneficiary Designation Form	Divisions		Select employee		
To be completed by participant & sent to RPC. **Must use paper form when	All Divisions	~	All Employees	~	
Spousai consent required					
Enrollment Form					
To be completed by participant & sent to RPC for account setup	Select export file type				
Online Enrollment Flyer	Adobe Acrobat (PDF)	~			
Generate an online enrollment flyer with your plan specific password, to					
provide new employees.			12	IBMIT	
			50		

The remaining documents will be located and can be directly downloaded from this screen by clicking on the document links, such as:

- 13 404(a)(5) Fee Disclosure
- 404(a)(5) Investments Comparative Chart

elect Forms								
View Documents   Filter column Filter value								
Document/Form Name		~	CLEAR RE	CLEAR RESULTS				
Document/Form Name	Document/Form Group	Employer	Created	Last Viewed	From	То	Delete	
01 RPC Services Agreem	Plan Documents	0-RPC Demo Company	09/07/2021	10/29/2021				
01b Plan Contact Authori	Plan Documents	0-RPC Demo Company	09/07/2021	09/07/2021				
01b Service Provider App	Plan Documents	0-RPC Demo Company	12/08/2021	12/08/2021				
01b Service Provider App	Plan Documents	0-RPC Demo Company	09/07/2021	09/07/2021				
02 3(38) Fiduciary Agree	Plan Documents	0-RPC Demo Company	09/07/2021	09/07/2021				
03 Matrix Trust Custodial	Plan Documents	0-RPC Demo Company	09/07/2021	09/07/2021				
03c Matrix Trust Custodi	Plan Documents	0-RPC Demo Company	09/07/2021	09/07/2021				
12a Retirement Plan Co	Plan Documents	0-RPC Demo Company	09/07/2021	09/07/2021				
12b Retirement Plan Co	Plan Documents	0-RPC Demo Company	09/07/2021	09/07/2021				
12c Retirement Plan Co	Plan Documents	0-RPC Demo Company	09/07/2021	09/07/2021				
12d Fiduciary Acknowled	Plan Documents	0-RPC Demo Company	09/07/2021	09/07/2021				

You can direct participants here: <u>https://retirementplanconsultants.info/plan-participant-resource-center/</u> for an online enrollment guide with step by step instructions.