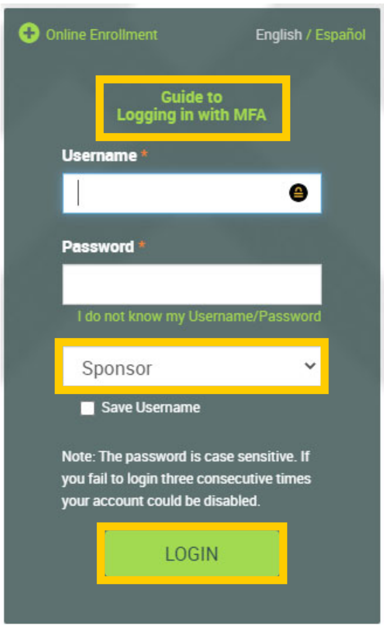
Sponsor Website Guide

Visit https://retirementplanconsultants.info/login/



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

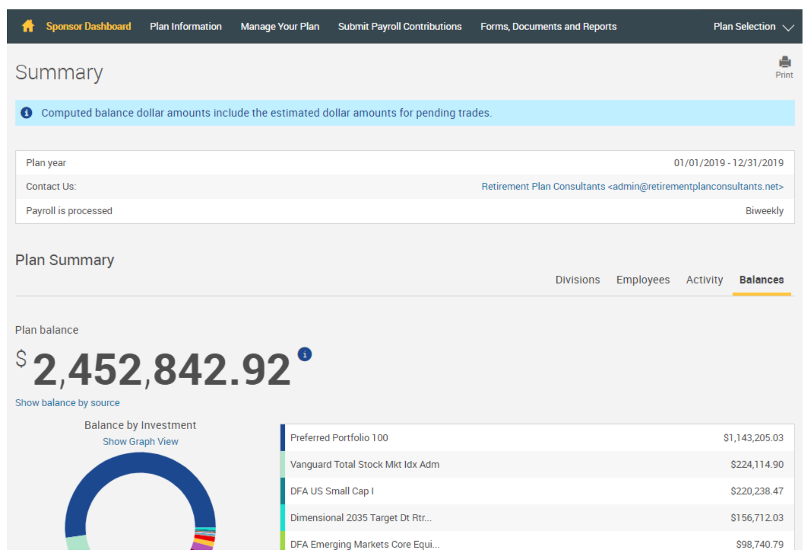
Select role from dropdown menu: **Sponsor**

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).

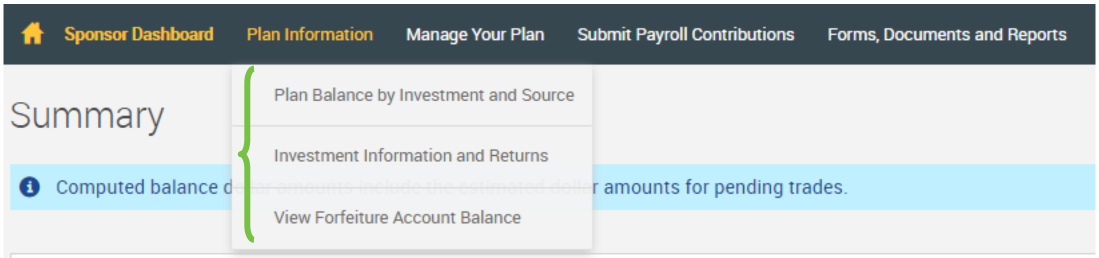
The **Sponsor Dashboard**, which provides a summary of your plan, is your homepage.

More information about your plan and participants can be accessed via tabs across the top.



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

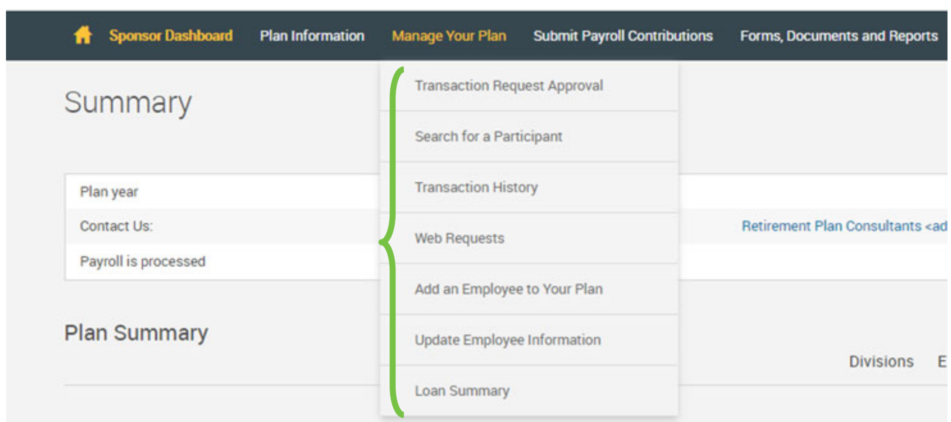
- Messages from your Advisor and/or RPC
- Options such as Change your Password, Upload a File to RPC, or Access RPC Compliance Portal
- Log out



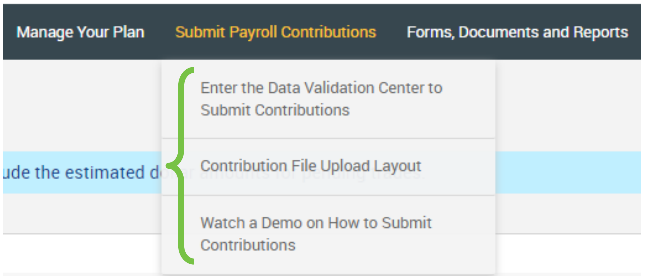
Plan Information tab:

- **Plan Balance by Investment and Source**
  See total plan assets by investment, or source. Within the Source View, you may see the total outstanding loan amounts.
- **Investment Information and Returns**
  Investment Prices are updated each business day. 1, 5 & 10 year performance is updated each calendar quarter.
- **View Forfeiture Account Balance**
  Forfeitures can be used for Employer Contributions or to pay plan expenses. Contact RPC for more information on using your forfeitures.

Manage Your Plan tab:



- **Transaction Request Approval**
  Review and approve pending online distribution and loan requests.
- **Search for a Participant**
  View Participant Current Balances and Access the Participant Website.
- **Transaction History**
  Search and Filter for Various Transactions.
- **Web Requests**
  Search and Filter for Various Web Requests that your participants may have requested.
- **Add an Employee to Your Plan**
  Add a new employee to your plan census.
- **Update Employee Information**
  Search participants and edit their account information. Select **Participant** > **Select Transaction** > **Open**
- **Loan Summary**
  View participants with loans, their current loan balance, next payment date, payment amount, and number of remaining payments.



Submit Payroll Contributions tab:

- **Enter the Data Validation Center to Submit Contributions**
  Submit Payroll Contributions within the DVC.
- **Contribution File Upload Layout**
  Provides required layout for each file type.
- **Watch a Demo on How to Submit Contributions**

Forms, Documents and Reports tab:

- **Forms and Documents**
  Access Participant & Plan Sponsor Forms, Plan Documents and Service Agreements.
- **Reports and Online Statements**
  Generate and Review Reports within our Reports Package.