



Summary Annual Report—Participant List Guide

This is a step-by-step guide for obtaining participant contact information via the Data Validation Center (DVC).

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).

Please note: This list generates all active participants which includes terminated employees with a balance. The information in this report contains information provided by the employer or participants. We recommend that you check for accuracy.

Click the **Reports** option under the **Forms, Documents and Reports** tab.

- 1) Select the **Employee Contact Information** report.
- 2) Choose **Excel** as the export file type and enter the current date in the **From** and **To date** fields.
- 3) Click the **Submit** button.