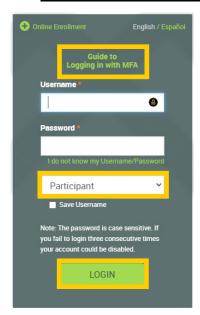


Transfer Money within Your Account

Visit https://retirementplanconsultants.info/login/



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

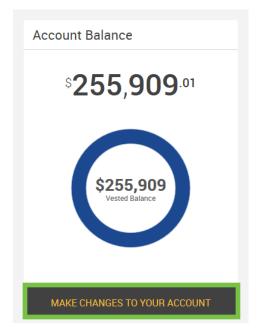
Select role from dropdown menu: Participant

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).

On the Participant Dashboard, your **Account Balance** will display.

Click the Make Changes to Your Account button.



Move Money

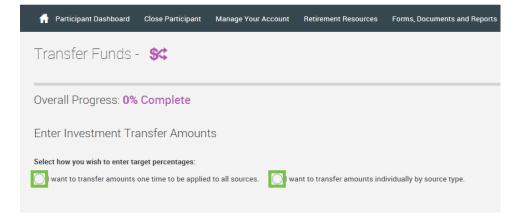
Transfer the money in your account between the funds in your plan.

GET STARTED

Click the **Get Started** link under the **Move Money** option.

Choose if you would like to move money for all of your sources, or simply one source (example: Employee Roth Contributions).

After you click the appropriate selection, the page will expand with more options.





Transfer Money within Your Account

Percentage to Percentage Dollar to Dollar Dollar to Percentage

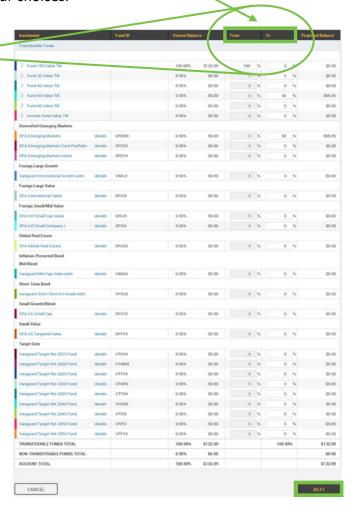


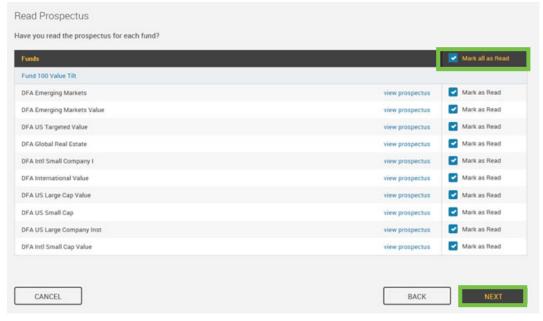
Complete the **From** and **To** columns for the money move.

Click the Next button.

Select the **Transfer Type** that applies to your intended transfer.

The bottom of the screen will update according to your choices.



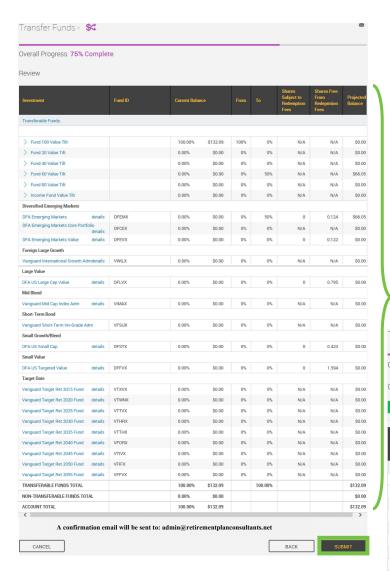


Read the appropriate prospectus and click the Mark as Read checkbox. You may click them all by selecting the Mark all as Read checkbox.

Click the Next button.



Transfer Money within Your Account



You will be provided a **Confirmation Number** for your records.

Click the **Done** button at the bottom of the page.

Review your changes.

Click the **Submit** button at the bottom of the page.

