

Update Rebalance Option

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.





If you already have a rebalance option set up this section will state the date of the next rebalance.

Click the **Get Started** link under the **Rebalance** option to make changes.



Update Rebalance Option

If you already have a rebalance option setup this section will state the frequency.

Select the **Make Changes** link under the **Recurring Rebalance** section.

🐈 Participant Dashboard 🛛 Close Participant Manage Your Account Retirement Resources Forms, Documents and Repo

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 \checkmark

Set date of first rebalance

hold percent for reba

By entering a threshold percentage, you are requesting that the rebalance only occur if the difference between your allocation percentage for any account and your current balance in that account exceeds the entered percentage. Should ALL accounts full below the threshold when the difference is calculated, no transfer will occur.

Rebalance 🔁 Recurring Rebalance

How often would you like to rebalance?

Select a day to rebalance your portfolio

26

Overall Progress: 100% Complete

Confirmation Number 18888. Your P

Frequency

Once a year

Rebalance Day

26

Next Scheduled Rebalance Date

03/26/2016

Overall Progress: 0% Complete

CANCEL

1



To **Turn ON** the recurring rebalance, complete the following sections:

1. How often you would like to rebalance:

- o Once a year
- o Twice a year
- o Every three months
- Every month
- 2. Set date of first rebalance.
- 3. Enter threshold percent for rebalance.
- 4. Click the **Next** button.

RPC rebalances on the 26th day of the month.

To **Turn OFF** the recurring rebalance:

- Toggle the button to OFF.
- Click the **Next** button.



Rebalance Threshold

0.01%

Plan Sel

📄 2

3

4

Print

You will be provided a **Confirmation Number** for your records. Click the **Done** button.