

Looking for More Information On Your 401(k) Plan?

1-800-523-401(k)

Welcome to the Account Inquiry and Modeling System at Retirement Alliance

To continue in **English, Press 1, #**

To continue in **Spanish, Press 2, #**

Enter your Social Security Number, Press #

Enter your PIN Number, Press #

During your call if you want to return to the previous menu, Press *

If you want something repeated, Press #

If you want to halt voicing and go to the next item, Press any number

Press 1 # - Current Account Balances & Investment Elections

Total Account Balance, Press 1,#

Uninvested Cash Balance by Source, Press 4,#

Total Account by Fund (or lifestyle), Press 2,#

Current Investment Elections, Press 5,#

Total Account by Source, Press 3,#

Total account by shares, Press 6,#

Press 2 # - Future Contributions: To change investment elections of future contributions

If you wish to change your investment elections, **and at the same time** realign your existing balances according to those same percentages, Press 1, #, otherwise press 2, #

Press 3 # - Existing Balance: To perform a fund to fund transfer or realign existing account balance

If you wish to realign your existing balances **and at the same time** change your investment elections to match your realignment percentages, Press 1, #

Otherwise Press 2, #: Perform a fund to fund Transfer, Press 1,#

Realign your entire account balance, Press 2,#

Press 4 # - Loan Information

Current Loan Information, Press 1,#

Maximum Available Loan Amount, Press 2, #

Loan Modeling , Press 3,# The caller is given an approximate loan payment amount, having supplied a requested loan amount, loan term, and payroll frequency.

Press 5 # - Account Balance Projection The caller is given an approximate balance at age 65, having supplied an assumed deferral amount, rate of return, and payroll frequency. The voice system also includes the effect of the caller's current account balance.

Press 6 # - Request Forms/Packets

Loan Application, Press 1,#

Distribution Packet, Press 3,#

Hardship Withdrawal Packet, Press 2,#

Fund Prospectus, Press 4,#

Press 9 # - Change the Caller's PIN

Press 0# - Transfer to a Consultant

NOTES:

- Not all menu options may be available with your plan.
- If transferring balances, please call back the following week to verify your transfer.
- Please change your initial PIN to a four to six digit number you will remember.
- If you have problems, please contact your company representative.