

# ACCOUNT ACCESS FAQs

The questions and answers below were compiled to address frequently asked questions in regard to Account Access.

## 1. I need a copy of my statements?

- ▶ From the **Overview** page or the **Access My Account** tab, select your desired plan
- ▶ Once under the correct plan, click **Statements & Confirms** on the left hand side of the page

## 2. How do I move from the fund I am currently in to a different fund?

- ▶ From the **Overview** page or the **Access My Account** tab, select your desired plan
- ▶ Once under the correct plan, click on the **Manage Funds** tab on the left hand side of the page

## 3. Where can I find information on account performance?

- ▶ Performance activity for specific plans can be found on the selected plan's page
- ▶ For performance activity across all plans, click the **Activity Across Plans** tab from the **Overview** drop down menu

## 4. How can I see my current contribution amount?

- ▶ From the **Overview** page or the **Access My Account** tab, select your desired plan
- ▶ Once under the correct plan, click on the **Contributions** tab on the left hand side of the page

## 5. How do I calculate my retirement benefits?

- ▶ To view your **Income Projection**, click on the **Income Projection** tab from the **Overview** drop down menu
- ▶ To customize your projection, you can use one of the custom calculators under the **Learning & Tools** tab

## 6. How do I know which account I am looking at?

- ▶ When accessing one of your accounts, the plan and plan number are located at the top of every page

## 7. How do I enroll in Managed Accounts?

- ▶ From the **Overview** page or the **Access My Account** tab, select your desired plan
- ▶ On the plan page, select the **Investments** link, then the **Guided Pathways** sub link; this will pull up the **Guided Pathways** page

## 8. How do I enroll in a TD Ameritrade Account?

- ▶ From the **Overview** page or the **Access My Account** tab, select your desired plan
- ▶ On the plan page, select the **Investments** link, then the **Brokerage** sub link, which will be available if the plan offers the Brokerage option

## 9. How do I enroll in Premier Services/Retiree Premier? How can I view the content provided through Premier Services/Retiree Premier?

- ▶ From the **Overview** page or the **Access My Account** tab, select your desired plan
- ▶ Once under a plan, click on the **Premier Services** tab on the left hand side of the page
- ▶ Once enrolled in Premier Services, you will be able to access all the content provided from this page
- ▶ If not enrolled, you will need to answer the questions to complete enrollment

## 10. Can I view or change my beneficiaries?

- ▶ From the **Overview** page or the **Access My Account** tab, select your desired plan
- ▶ Once under the correct plan, click on the **View Beneficiaries** tab on the left hand side of the page

## 11. How do I change my User ID, password, or security questions?

- ▶ Click on the **My Profile** tab located in the top-right of any page
- ▶ From this page, you have the option to change your User ID, password, or security questions

## 12. Where can I find a list of the investments and their fund performance that are available for my account?

- ▶ From the **Overview** page or the **Access My Account** tab, select your desired plan. On the plan page, select the Investments link
- ▶ Click on **Fund Profiles** to see a list of available investments
- ▶ Click on **Fund Performance** to see the performance of those funds