



Online Enrollment

Visit <https://www.yourplanaccess.net/retirementplanconsultants/>

Click **Online Enrollment for New Plans** on the right hand side

Type in the password: **WELS** and click the **Begin** button

Type in your **Social Security Number** (no spaces or dashes) and click the **Continue** button

Follow the easy **5-step process** to enroll online. Please read all instructions on the website before completing each step.



Online Enrollment



Personal Information

Items marked with an asterisk (*) must be completed before you can proceed to the next step.

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Username Information

Establish your Username: (alphanumeric digits, case-sensitive) *

Establish your Password: (digits, case-sensitive) *

Re-enter Password: *

Remember your Username and Password. You will need them to access your account via the plan website in the future.

Your Personal Information

First name: *

Last name: *

Date of Birth (mm/dd/yyyy): *

Date of hire: *

Marital Status: ▼ *

Gender: ▼ *

Address Line 1: *

Address Line 2:

City: *

State: ▼ *

Postal Code (Zip): *

Country:

Home phone number: () -

I do not have an e-mail address

Home Email: *

Be sure to continue through all steps of the enrollment process until you receive confirmation that your enrollment is complete. If you cancel or close your browser before completing the process, your enrollment will not be processed.

Step ONE: Complete all Personal Information and click the **Save and Continue** button

Please note that all fields marked with an asterisk (*) must be completed

Step TWO: Print off the Beneficiary Form, complete and return a copy to your HR Department and Retirement Plan Consultants LLC.

Click the **Next** button

Retirement Plan Consultants

Enrollment Steps: Account Summary | Balances and Returns | Forms/Documents/Reports | Tools | Contact RPC

Personal Info. Beneficiaries Contributions Investment Elections

Designate Your Beneficiaries

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To proceed to the next step or return to a previous step, click on the name of the step in the arrow and that form will be displayed. Your data will be saved when you leave a form but your enrollment will be complete only after you receive confirmation of your changes and select the Finish button.

This designation can have important tax and legal effects. You may wish to consult your advisor or lawyer when completing the below beneficiary form.

Please print the below form and return a copy to your company's Human Resource department. Please also submit to Retirement Plan Consultants by attaching a completed copy during step 5 of the enrollment process or mailing to Retirement Plan Consultants.

Retirement Plan Consultants | Attn:Account Setup | PO Box 1264 | Norfolk, NE 68702

Beneficiary Form.pdf

Once you have printed out the above Beneficiary Form, click Next

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Personal Info. Beneficiaries Contributions Investment Elections

Contribution Limits

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Confirmation E-mail Address

A confirmation e-mail will be sent to the address listed below.

No e-mail address on record

If this address is incorrect, please correct the address in the fields provided.

To proceed to the next step or return to a previous step, click on the name of the step in the arrow and that form will be displayed. Your data will be saved when you leave a form but your enrollment will be complete only after you receive confirmation of your changes and select the Finish button.

Current Contribution Amounts

Last Web/VRU Contribution	Total
Pre-Tax Deferral	\$0.00 per pay period
Roth	\$0.00 per pay period

Change Contribution Amounts

Please enter a contribution percentage or dollar amount that your employer will deduct from your compensation each payroll period for deposit to your retirement plan account.

Rules and Criteria

Action	Contribution Type	Percent/Dollar	Current Contribution	New Contribution Rate
no change	Pre-Tax Deferral	Percent <input type="checkbox"/>	Not contributing	0.00 per pay period
no change	Roth	Percent <input type="checkbox"/>	Not contributing	0.00 per pay period

Step THREE: Select "change" to add the contribution amount. Select "stop contribution" if you wish to not withhold anything.

Click the **Next** button



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Personal Info. Beneficiaries Contributions **Investment Elections**

Select Investments

Personal Information Beneficiaries Contributions **4** Investment Elections Confirmation 5

To proceed to the next step or return to a previous step, click on the name of the step in the arrow and that form will be displayed. Your data will be saved when you leave a form but your enrollment will be complete only after you receive confirmation of your changes and select the Finish button.

Select a source of money from the list below to enter the election percentages for investments in that source. Please note that once you have completed the enrollment process, you can always change your investment election percentages.

We encourage you to contact your Financial Advisor with assistance in selecting your investment election.

Source of Money

If selecting different Investment Elections for your sources, remember to return to this step and complete for each source.

- All Sources
- Employee Roth
- Employee Trad Deferral
- Employer Match
- Employer Profit Sharing
- Unrelated Rollover

If you do not provide investment directions for your contributions, they will be defaulted to the Vanguard Target Ret 2040 Fund until you provide other investment instructions. Once contributions are defaulted, it is your responsibility to realign them in accordance to your investment elections. For more information, please contact your plan administrator.

Previous Skip

Step FOUR: Select a Source from the list and enter the election percentages for investments in that source

Please contact your Financial Advisor or Retirement Plan Consultants as needed .

There is a "How to Invest" Questionnaire and Prospectuses available to also assist with asset allocation choices

Step FIVE: Review your steps and click the **Finish** button to submit your entries and complete the online enrollment

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Review and Confirm all of your Entries

Personal Information Beneficiaries Contributions Investment Elections Confirmation 5

Personal Information: Edit

Username:	jdoo123
First Name	John
Last Name	Doe
Date of Birth (mm/dd/yyyy)	01/01/1960
Date of hire	01/01/1998
Marital Status	Single
Address Line 1	123 Elm Street
Address Line 2	
City	Any Town
State	CA
Postal Code (Zip)	12345
Country	United States
Home phone number	(123) 123 - 1234
Send Email confirmation to:	None
Home Email	

Salary Deferral Elections: Edit

PRE-TAX CONTRIBUTIONS	Deduct 3.00% each pay period.
ROTH 401(k) CONTRIBUTIONS	Deduct 0.00 each pay period.

Beneficiary Designations: Edit

If you do not designate any beneficiaries, your account will be distributed in accordance to plan provisions in event of your death.
Please upload your completed beneficiary form using the file upload module at the top of the page or return to your HR manager.

Investment Elections: Edit

All future contributions to the plan will be invested as follows:

	Target Date
Vanguard Target Ret 2025 Fund	100.00%

If your enrollment information is correct, click below to submit your enrollment request

Finish

Personal Information Beneficiaries Contributions Investment Elections Confirmation 5

Retirement Plan Consultants LLC | 877-800-1114 | admin@retirementplanconsultants.net | Problems viewing the site?



Online Enrollment

The screenshot shows the Retirement Plan Consultants website interface. At the top left is the company logo. A navigation bar contains links for Account Summary, Balances and Returns, Transactions, Forms/Documents/Reports, Tools, Password Change, and Contact RPC. The main content area has a yellow background and displays the following text:

Congratulations! Your Enrollment is Complete.

You may access your account via the plan's website at any time using your Username and Password. If you elected to receive email confirmations, you will receive confirmation of your enrollment at the email address specified.

Reminders:

Reminder! If you select investment elections by source ensure you select an investment direction for all sources. If an investment election is not selected, you will be placed in the default investment.

Please remember to submit the beneficiary designation form to your Human Resource Department and Retirement Plan Consultants in a timely manner.

If you do not designate any beneficiaries, your account will be distributed in accordance to the plan provisions in the event of your death.

Below the text is a button labeled "Continue" with the text "Go to plan website" underneath it.

At the bottom of the page, a footer contains the text: Retirement Plan Consultants LLC | 877-800-1114 | admin@retirementplanconsultants.net | Problems viewing the site?

The Confirmation Screen will display.

Please feel free to contact RPC at any time with questions by phone or email!

Phone – 877-800-1114 (toll-free)

Fax – 402-379-3818

Email – admin@retirementplanconsultants.net

