FREQUENTLY ASKED QUESTIONS ABOUT YOUR CLIENT PORTAL.

Sharing sensitive financial documents is both safe and easy. And now, better than ever.

Why has my document portal changed?

We are happy to announce some improvements to our Client Portal. This portal will continue to be used for securely sharing financial documents, with increased cybersecurity. The new updates also provide improved functionality to help us better serve you, such as providing your yearly plan questionnaire, and easier access to account information from anywhere.

Where can I find the client portal?

The portal upgrade is now live, as of November 1, 2023.
- You can directly access it from any browser connected to the internet at https://ysp.retirementsolutiongroup.com/Login
- The Client Portal can always be accessed from any page on our website, using the Portal Login button at RetirementSolutionGroup.com

How do I access the client portal?

You log into the client portal using the same username and passwords you have always used. Your login should be your email address we have on file. If for any reason you've forgotten either your username or password, you can request a reset directly on the portal page. You will also be prompted to update your password.

Based on your login, the portal will recognize your role and give you the proper level of permissions to view or edit information as a:
- system administrator
- internal employee (the plan administrators or any RSG employee)
- external contact (primary contacts, financial advisors etc.)

What is different with this upgrade?

The portal looks a little different, but it's still simple to use.
- Documents can be found under the Documents link in the left menu.
- A two year history of documents is now available as well.
- To download a document, simply find and select the document in the appropriate year.
- To upload a document to the portal, follow the step-by-step instructions provided on the next page.

The biggest upgrade is to the security of the site. Cybersecurity is a critical aspect of a plan sponsor's fiduciary responsibility. In simple terms, we are increasing the protection of sensitive plan and participant data — and by extension, your participants' financial well-being and retirement security.

Here's what the new login page looks like:
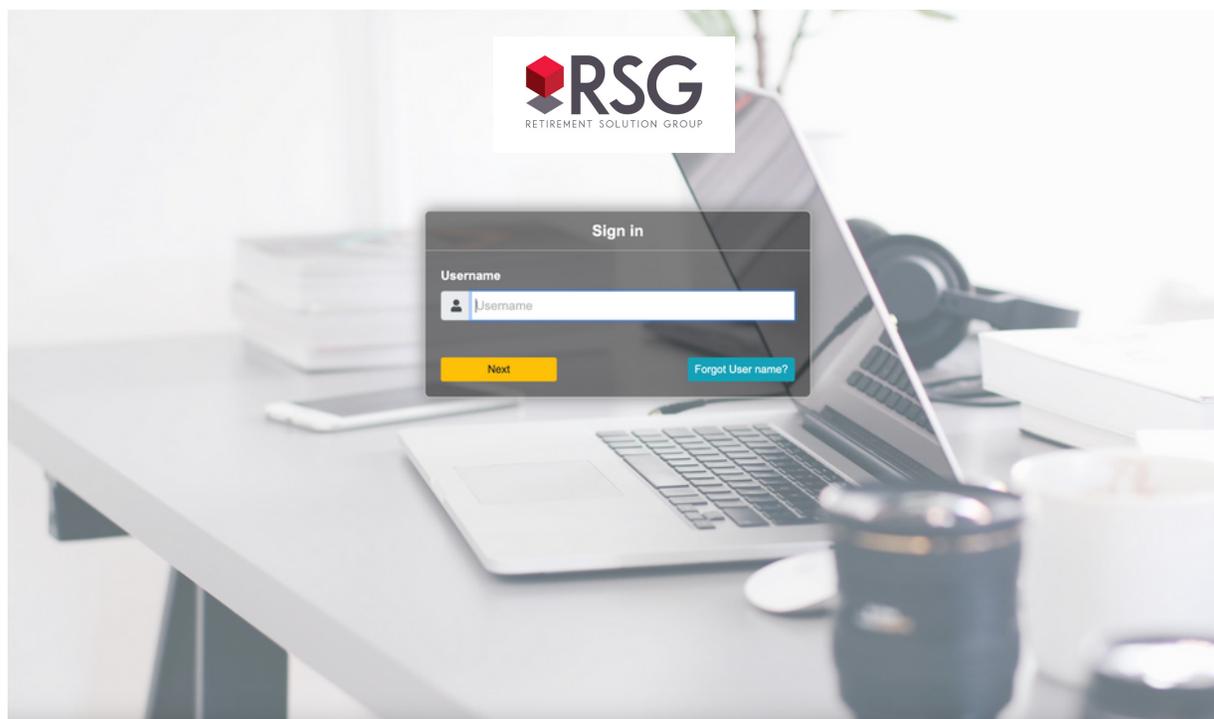
How do I manage my documents on the portal?

The client portal is user friendly and easy to navigate. It will prompt you, helping you to do common tasks, like uploading a document or downloading a notification. And if you get stuck, there is a help button to direct you to additional resources. Of course, you can always reach out to your RSG team for assistance as well.

Document management is easy using the Client Portal

Uploading a Document to the Portal

After you log in, from the Documents page, click on the Upload documents button.
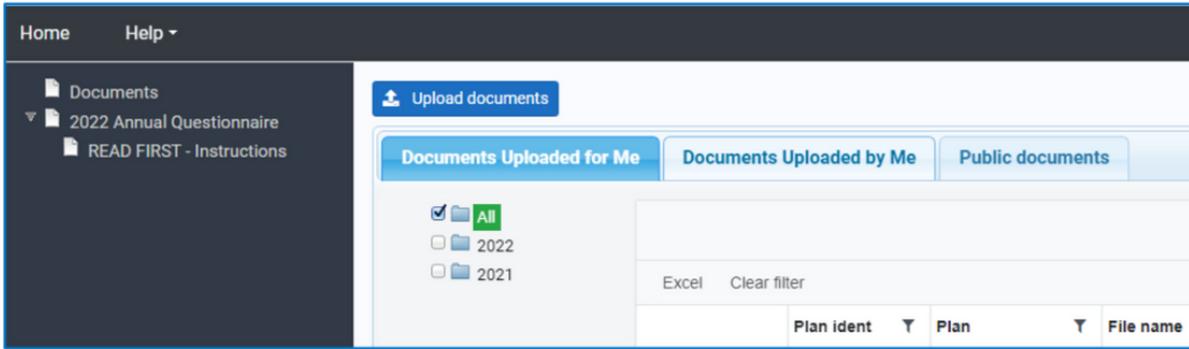
Step 2: Selecting Files

Drag and drop or click to select file(s).
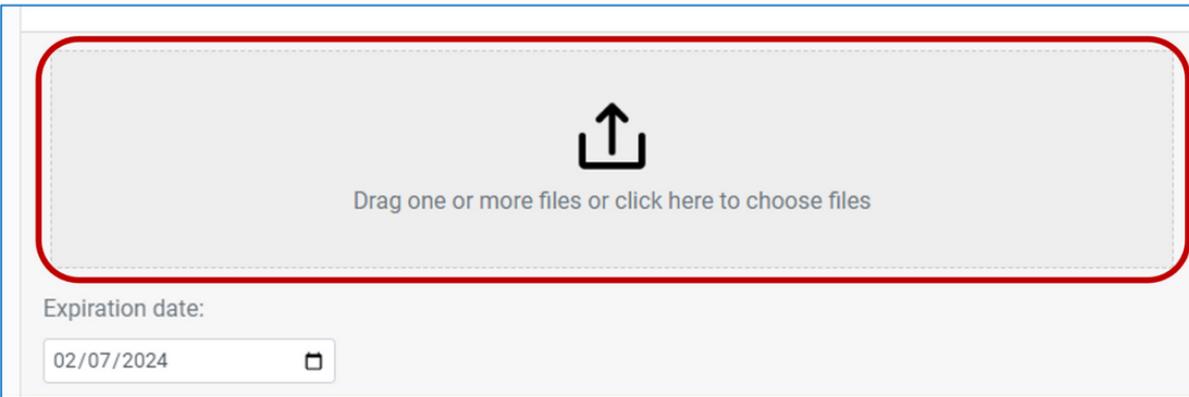
Drag and Drop Example

Click on the file, then drag and drop it for uploading
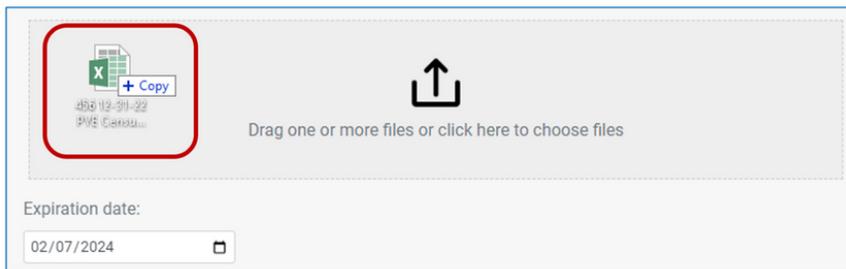
Select Example

Alternatively, you can click to navigate to and select the file(s).
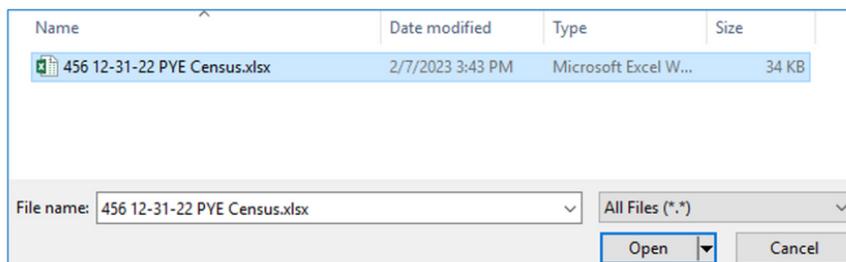
Step 3: Upload

Click the Upload button to upload the file(s) to the portal. The file(s) will be uploaded to the portal and an email sent to the consultant assigned to your plan.

Step 4: Verify

To verify the files have been uploaded, click on the Documents Uploaded by Me tab.

We're Here to Help

If you need additional assistance of any sort, please contact your retirement plan team at Retirement Solution Group:

Retirement Solution Group

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