

# ACCESSING YOUR RETIREMENT PLAN IS EASIER THAN EVER!



Everything you need to know about your retirement plan is now accessible to you in one place. You can monitor your 401(k) balance, change how much you invest in the future, name your beneficiaries and much more. You'll receive an email or text message with a link you sign up for your new 401(k) plan. Or you can visit [app.401go.com](http://app.401go.com) and select "employee."

## Get Started!

To log in, you'll need to first set up your "Employee" account access. Remember, you can edit your portfolio, contribution amounts, and beneficiaries at any time.



### Step 1: Choose how to save

Pick Pre-Tax or Roth (Post-Tax) as well as the percentage. If you want a flat dollar amount or something different, select the Advanced option.

### Step 2: Personal Info

You will need to provide info like your Date of Birth and Home Address.



### Step 3: Primary Beneficiary

You will need to add the First and Last Name and Phone Number of your Primary Beneficiary.



### Step 4: Strategy Builder

Answer 4 questions to assess your risk. This will put a portfolio together for you based on your age, time to retirement and risk tolerance.

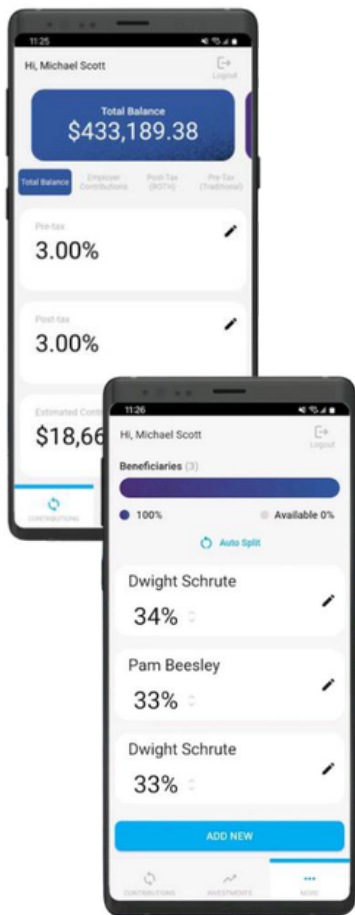


### OPTING OUT

If you choose not to participate, simply click "Opt-Out". You can always log back in and start contributing later.

# Introducing the 401GO Mobile App

The 401GO mobile app gives participants an easy way to manage their retirement accounts



## Monitor balances

- ✓ View total account balance, pre- and post-tax balances, and employer contributions. You can also view and change your deferral rates and get an estimate of how much you will contribute in a year at your current rate.

## Manage investments

- ✓ Get a detailed view of your investment portfolio with percentages. You can add, remove, or adjust the amount of individual investments.

## Change beneficiaries

- ✓ See who your beneficiaries are, and at what percentage rates. You can also add, remove and change beneficiaries to be sure your funds are handled the way you have planned.



### GET THE APP

Find the 401GO mobile app on the Apple Appstore and ther Google Play store.



## Congratulations!

You've completed the setup of your new 401(k) account!

[ACCOUNT LOGIN](#)

If you have any problem accessing or setting up your account, please reach out to:

[www.401GO.com](http://www.401GO.com)

(801) 214-2125

[support@401GO.com](mailto:support@401GO.com)

If you need additional assistance with retirement planning support, please contact your retirement plan team:

**RSG Advisory**

866.352.7731 x100 | [info@RetirementSolutionGroup.com](mailto:info@RetirementSolutionGroup.com)

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