



▶ ACCESSING YOUR
RETIREMENT PLAN ACCOUNT
..... 1-2



▶ VOICE RESPONSE SYSTEM
..... 1



▶ WEBSITE NAVIGATION
..... 2

Retirement *account*

INFORMATION CENTER

Voice Response System

Upon enrollment in the Plan, a memo will be sent to you containing your Personal Identification Number (PIN) that will be used for accessing the Voice Response System.

For your convenience, you can access your retirement account 24 hours a day, 7 days a week. Customer Service Representatives are available to answer any questions you may have Monday through Friday from 7 a.m. to 6 p.m. Central Standard Time (except on major holidays).



ACCESSING YOUR ACCOUNT

Dial **1-877-459-4568**: To access your account, choose prompt #2; to access customer service, press prompt #3.

- ◇ Dial 1 for English, 2 for Spanish
- ◇ Enter your Social Security Number
- ◇ Enter your PIN

Choose from the following options:

- 1 Personal Account Information
 - 1 Balance Information
 - 2 Investment Information
 - 3 Contribution Information
 - 5 Transfer Between Investments
 - 6 Confirm Ending Balances
 - 9 Return to Previous Menu
- 2 Current Investment Options
- 3 To Change PIN
- 9 To End Call

Helpful Hints

- ◇ If you know the selection you wish to access, you can select those at any time.
- ◇ For example, pressing *21 will direct you to fund prices, or pressing *1 will automatically direct you to account balances.
- ◇ The star key (*) will cancel almost any selection and will automatically return you to the main menu.



A New Vision for Retirement Plan Services



Website Navigation

Go to: www.icapitalforme.com

Login using your user name & password

Forgot User ID or Password?

If you have lost or forgotten your username or password, click on the link "Forgot User ID or Password?" and enter requested information. A security question will be asked and if answer correctly, your User ID and Password will be reset to your Social Security Number and the last four digits of your SSN respectively.

MY ACCOUNT SUMMARY

- ◆ See and manage entire account from one page
- ◆ Review and Change Personal Information
- ◆ Read the latest information about your plan from the "Important Message" section
- ◆ Manage other areas of your account by clicking on "Manage" links

MANAGE MY ACCOUNT

- ◆ View Account Balances
- ◆ View Investment Rate of Return and make changes to your current investment portfolio
- ◆ View Investment Profiles
- ◆ Invest New Contributions and align future investments
- ◆ Manage Existing Account Balance
- ◆ Manage Payroll Deductions and adjust contribution amounts | if available₁
- ◆ Model Loans to view maximum amount allowable by the Plan | if available₁

MY REQUESTS / REPORTS

- ◆ View Account Transactions
- ◆ View Reports and Create Custom Plan Statements
- ◆ View Web Requests

MY PROFILE

- ◆ Review and/or Change Personal Account Information
- ◆ Review and/or Change Beneficiary Information | if available₁

TOOLS

- ◆ Use Retirement Calculator
- ◆ Research Investment Advice and Education
- ◆ View Plan Limits
- ◆ View Quarterly eStatements

¹ Please note that these are optional features and may not be available for all plans