



Retirement Plan Consultants LLC

401k Consultants LLC
www.401kconsultants.net

403b Consultants LLC
www.403bconsultants.net

457 Consultants LLC
www.457consultants.net

Sponsor Website Guide

- LOGIN

- o Visit one of the websites listed above
- o Click "Sponsor Access" in the column at the right of the webpage

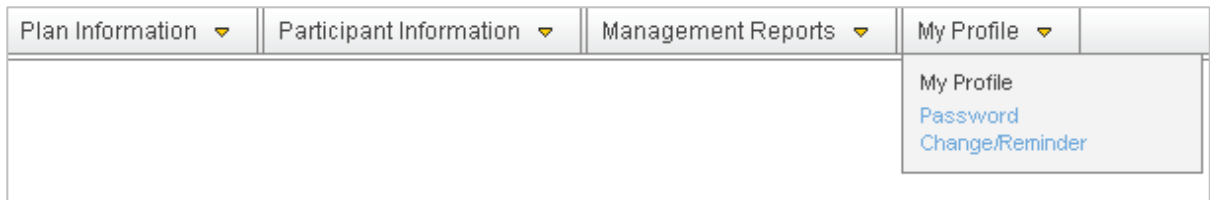


- o Input User ID (as provided in your welcome letter)
- o Input Password (as provided in your welcome letter)

Username:

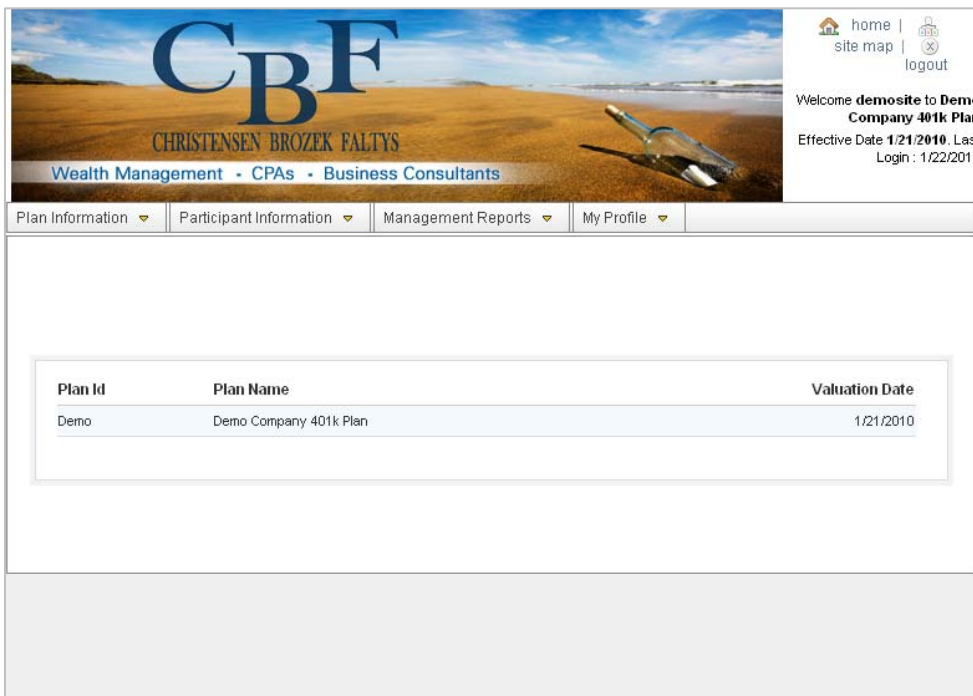
Password:

- o Upon initial login, please go to My Profile > Password Change/Reminder, and enter and submit a new password.



- HOME

- o Your Home Page will appear upon login.





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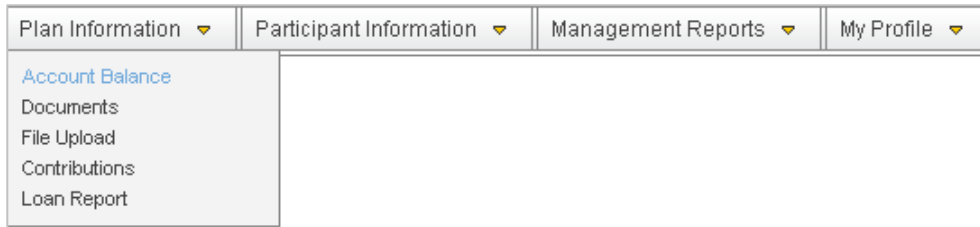
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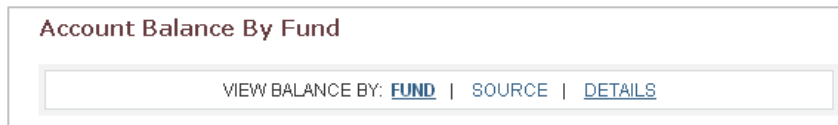
Sponsor Website Guide

-ACCOUNT BALANCE

- From the Plan Information tab, choose to view Account Balance or view Documents or Loan Reports stored in the system.

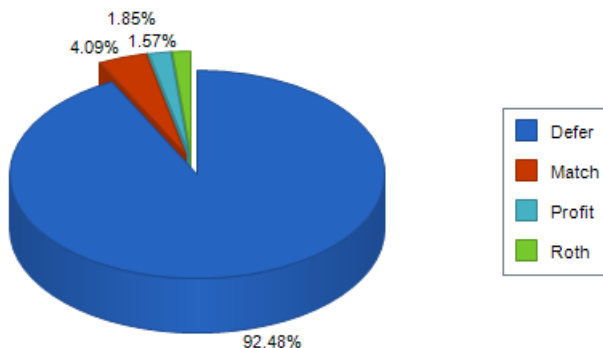
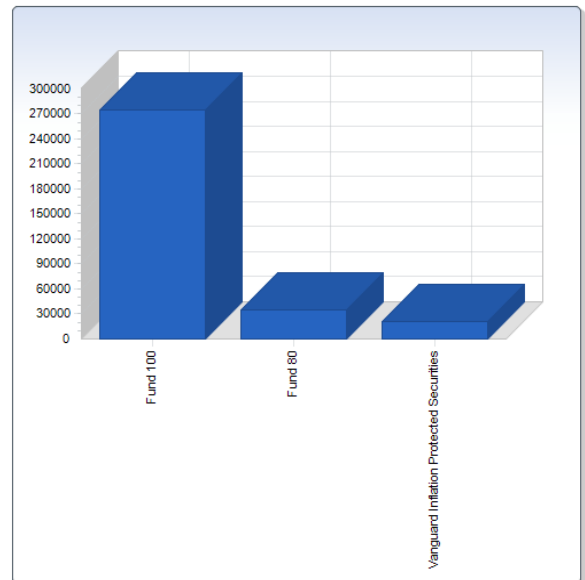


- Account Balance summaries may be viewed by choosing: Fund, Source or Detail.



- The Account Balance by Fund report, as shown to the right, will summarize a group's asset allocation.

Fund Id	Fund	Balance	Units	Price
DFEMX	DFA Emerging Markets	\$612.00	22.768	\$26.88
DISVX	Fund 100	\$274,395.00	18377.622	\$15.44
VFITX	Fund 80	\$823.68	59.141	\$11.26
VBMFX	Fund 80	\$34,668.92	2354.954	\$10.48
VIPSX	Vanguard Inflation Protected Securities	\$21,024.46	1652.866	\$12.72
VMMXX	Vanguard Prime Money Market	\$600.00	600	\$1.00
Total:		\$332,124.06		



- The Account Balance by Source report, as shown in the pie chart to the left, summarizes the source of group funds.



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-PARTICIPANT INFORMATION

- o From Participant Information, choose to view participant specific fund and source reports or make administrative changes as shown in the example below.

Plan Information ▾	Participant Information ▾	Management Reports ▾	My Profile ▾
	<ul style="list-style-type: none"> Select Participant Account Balance Loan Modeling Outstanding Loan Balances Administrative Changes Census Information Add Participant 		
Plan Id			Valuation Date

Administrative Changes

Participant: Owens, Terrell | Participant ID: 2000002 | [Select New Participant](#)

Vru Pin: 7890
Internet Password: 234567890

Last Name	<input type="text" value="Owens"/>	First Name	<input type="text" value="Terrell"/>	Middle Initial	<input type="text"/>
Title	<input type="text"/>	Married	<input type="checkbox"/>	Gender	<input type="radio"/> Male <input type="radio"/> Female
Address1	<input type="text"/>	Address2	<input type="text"/>	City	<input type="text"/>
State	<input type="text" value="CA"/>	ZIP	<input type="text"/>	Country	<input type="text" value="US"/>
Phone	<input type="text"/>	Fax	<input type="text"/>	Email	<input type="text"/>

Plan Specific Data

Employee Number

-MANAGEMENT REPORTS

- o From the Management Reports tab, choose from a variety of balance and asset allocation summaries. The Asset Allocation by Age Group report is shown below.

Plan Information ▾	Participant Information ▾	Management Reports ▾	My Profile ▾
		<ul style="list-style-type: none"> Participant Diversification Average Balances by Age Group Fund Utilization Asset Allocation by Age Group Fund/Fund Model Tables for Fact Sheet 	
Plan Name		Demo Company 401k Plan	

Age Group	Balance
<input type="checkbox"/> 21 - 35	\$16,437.78
<input type="checkbox"/> 36 - 45	\$33,000.42
<input type="checkbox"/> 46 - 55	\$34,668.90
<input type="checkbox"/> Over 65	\$248,016.96
Grand Total:	\$332,124.05