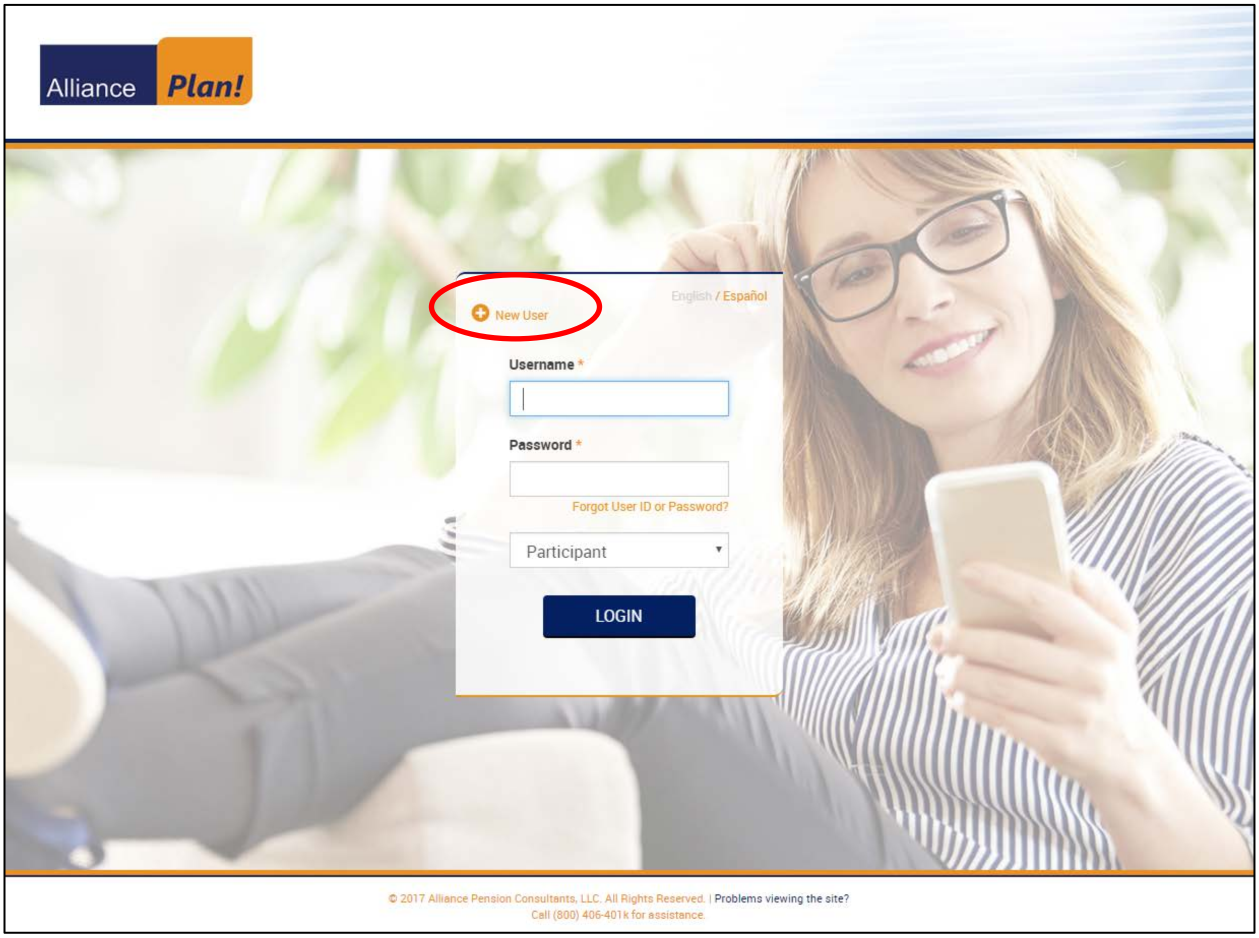
A Guide to Online Enrollment
Instructions for New Web Users

Go to www.Alliance-Plan.com.

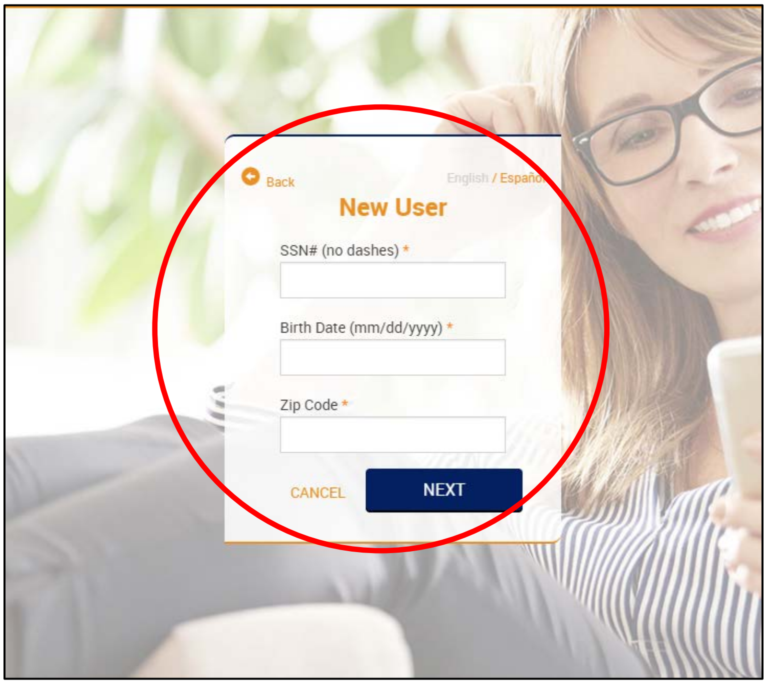
Click on "***New User***" to get started.



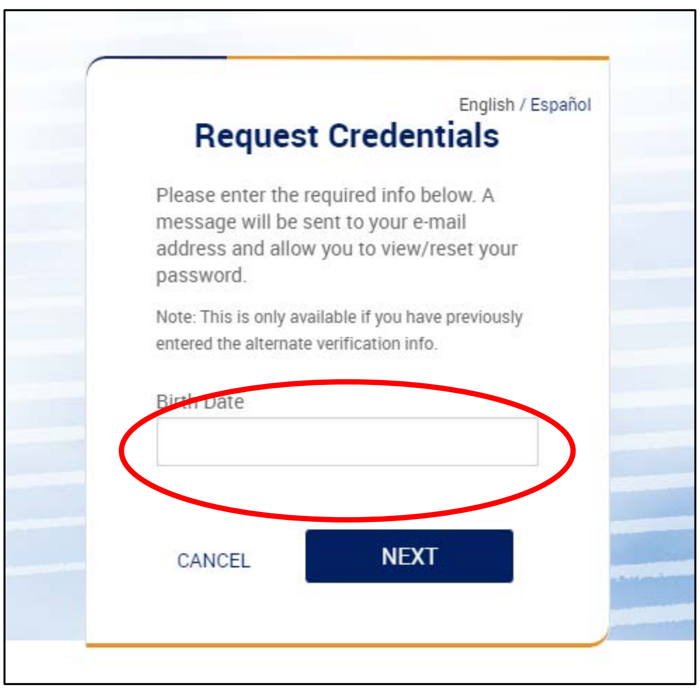
IMPORTANT NOTE: Your elections and changes will not be processed until all enrollment steps are completed and submitted. You will receive confirmation upon completion *(refer to the last page of this instruction guide for more information)*.

1 **Security Setup.** Upon selecting "New User", you will begin the first section, which asks you questions that initiate the enrollment process and establish security protocol.

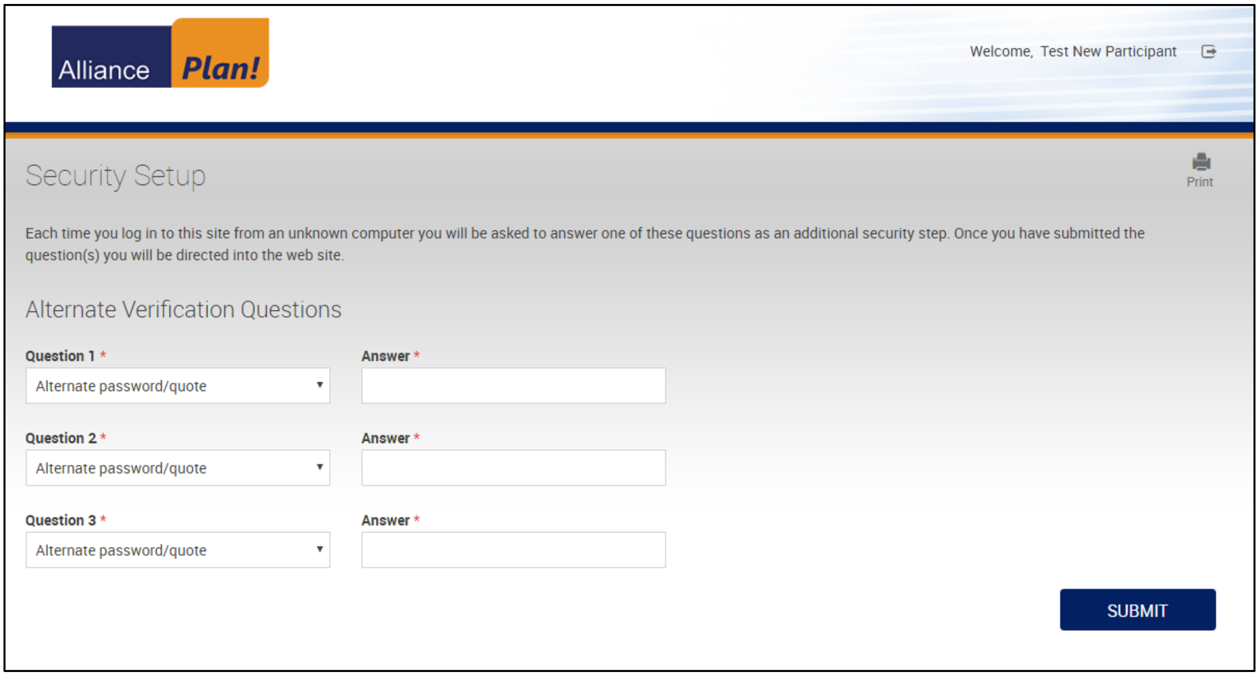
A. Enter your **Social Security Number** (without dashes), **Birth Date** (MM/DD/YYYY) and **Zip Code** (5 digits only), then click **Next**.



B. For security, once again enter your birthdate (MM/DD/YYYY) and click **Next**.

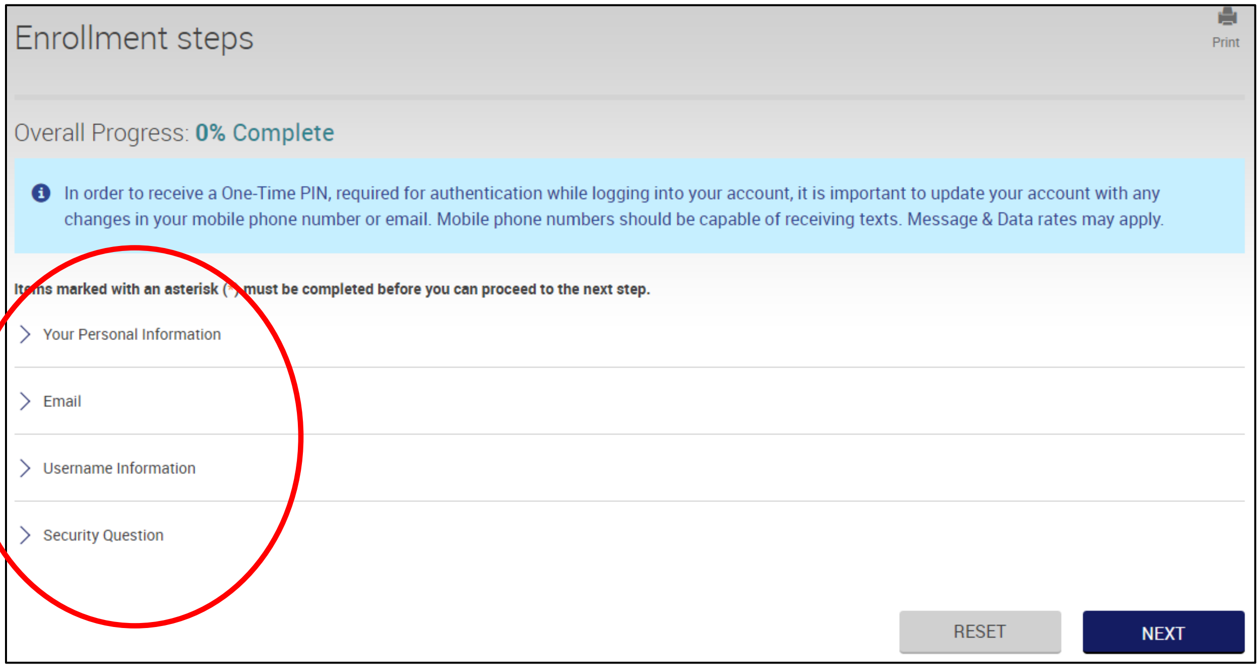


C. Security Questions. From the drop down menus, choose three different questions and fill in your answers. These will be used in the future to verify your identity when logging in from a new computer or mobile device. When finished, click **Submit**.



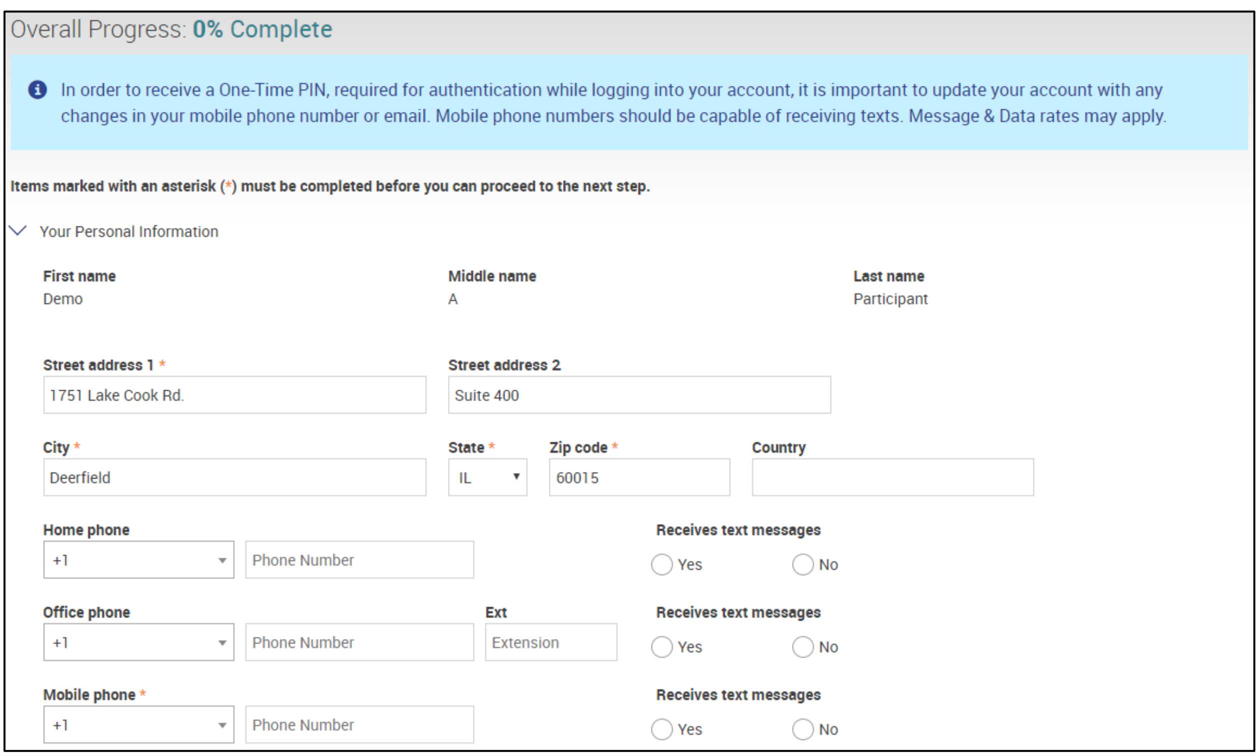
Continue to Step 2 ----->

2 **Enter and Review Your Personal Information.** Within the 4 dropdown menus on the screen, you must review and/or enter information as listed below.



A. Your Personal Information

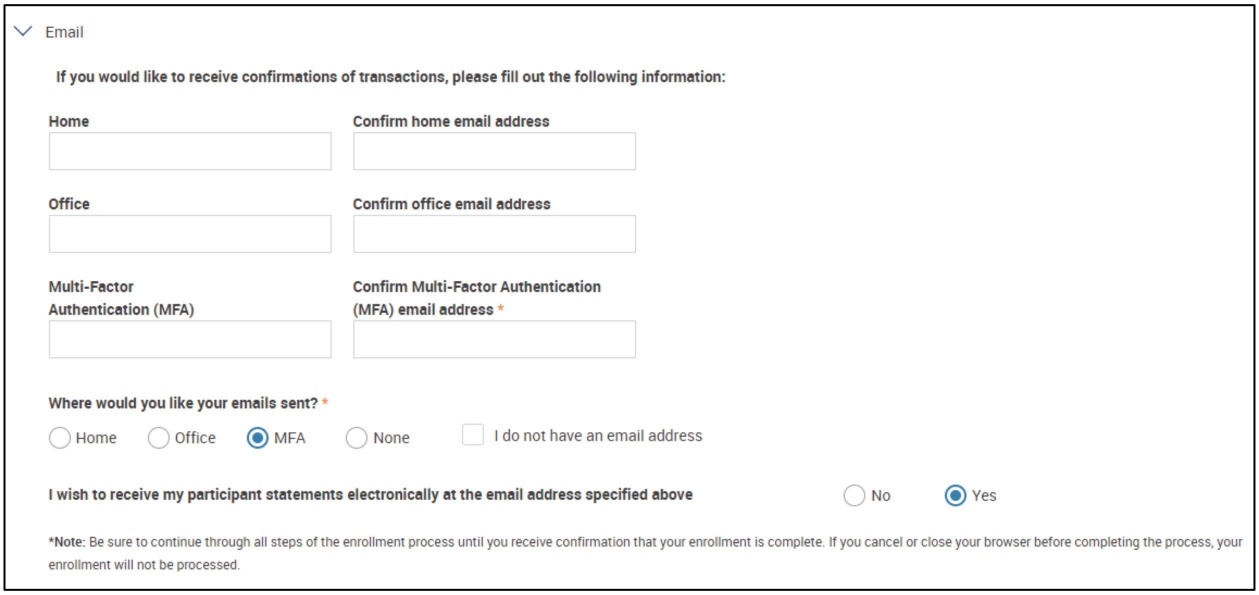
Review the information listed to ensure that it is accurate. If your address is not correct, you must contact your Plan Administrator immediately to have the information updated. **In addition, for setup of Multi-Factor Authentication, you are <u>required</u> to enter a mobile phone number and confirm that phone can receive text messages.**



B. Email

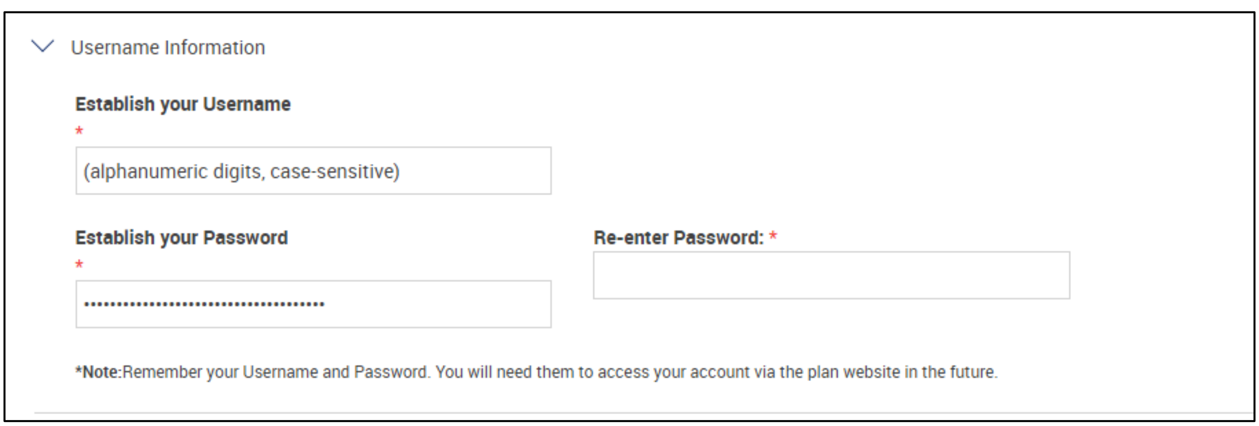
For setup of Multi-Factor Authentication, you are required to enter a "One Time PIN" email address. You may also enter a home and/or office email address. Choose where you'd prefer emails to be sent and if you wish to receive statements electronically.

NOTE: Your email(s) will **ONLY** be used for plan-related communications such as Multi-Factor Authentication, transaction confirmations, and important messages.



C. Username Information

Enter your new Username and Password. Your Username must be 6-12 characters in length, and your password must be 8-30 characters in length. In addition, both must contain at least one letter and one number.



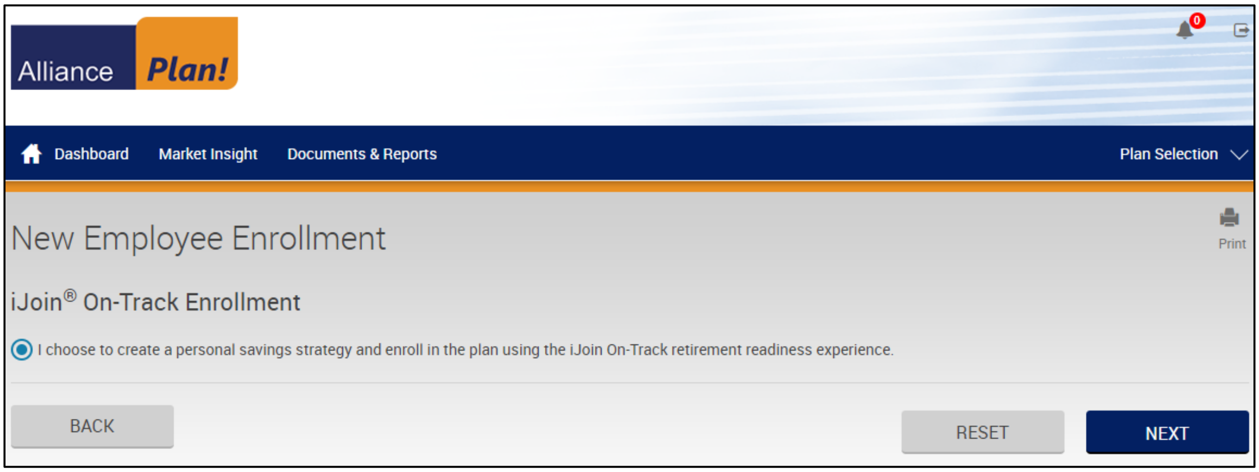
D. Security Question

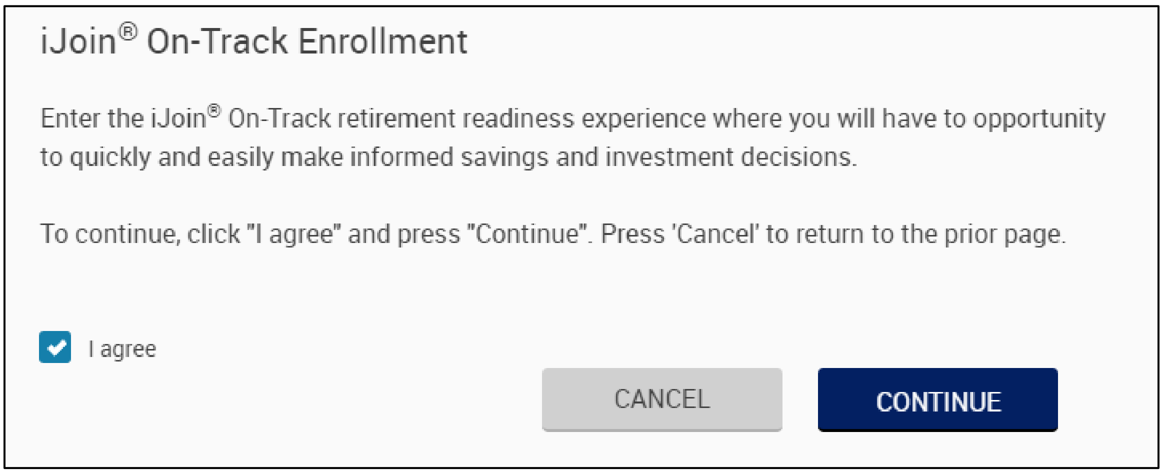
You may review your security question responses from the previous step. Click **Next**.

Continue to Step 3 ----->

3

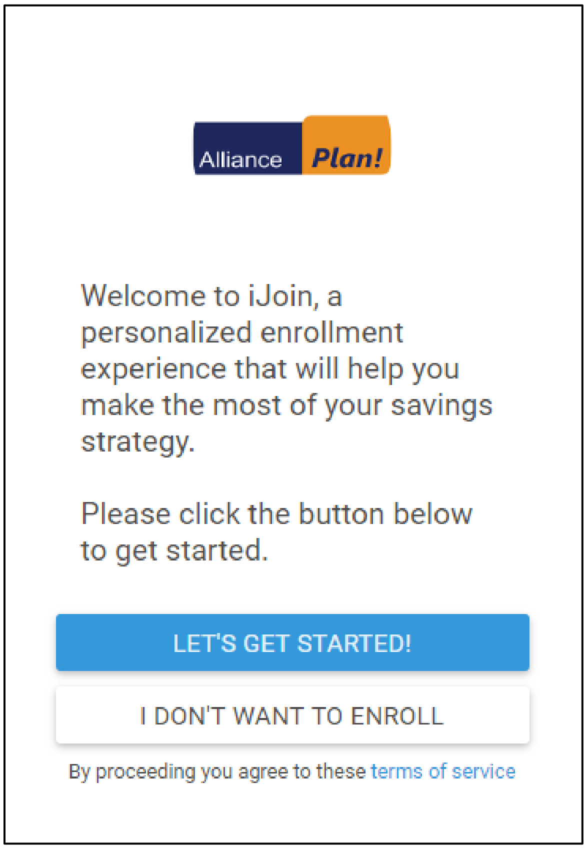
Enroll. To begin enrolling, click **Next**. Then click the "I agree" checkbox and **Continue**.





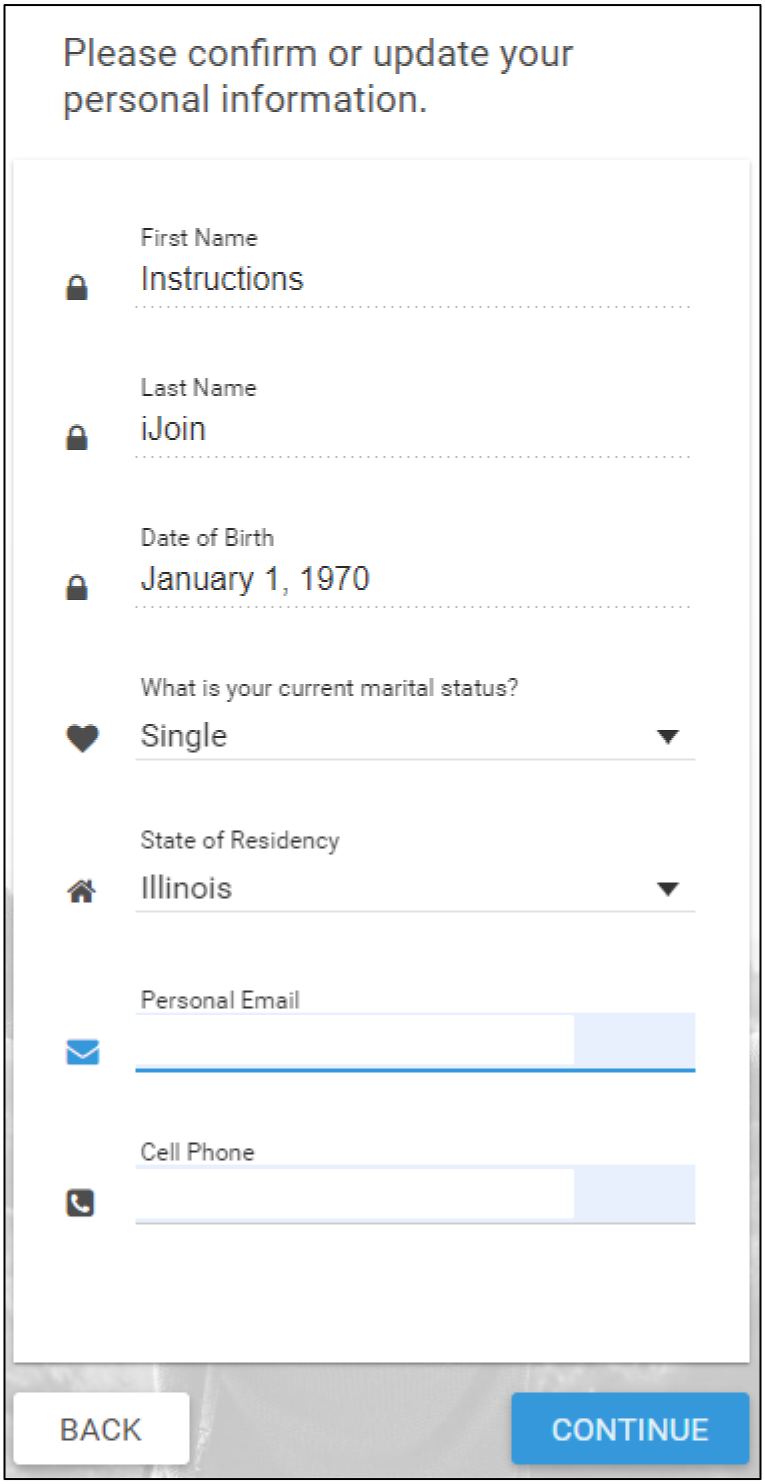
Continue to Step 4 ----->

Getting Started. Click **Let's Get Started** to begin enrollment. Then, watch the welcome video or click **Continue**.



Continue to Step 5 ----->

5 **Personal Information.** Review and update your information, if necessary. Click **Continue**.


Please confirm or update your personal information.

First Name
Instructions

Last Name
iJoin

Date of Birth
January 1, 1970

What is your current marital status?
Single

State of Residency
Illinois

Personal Email

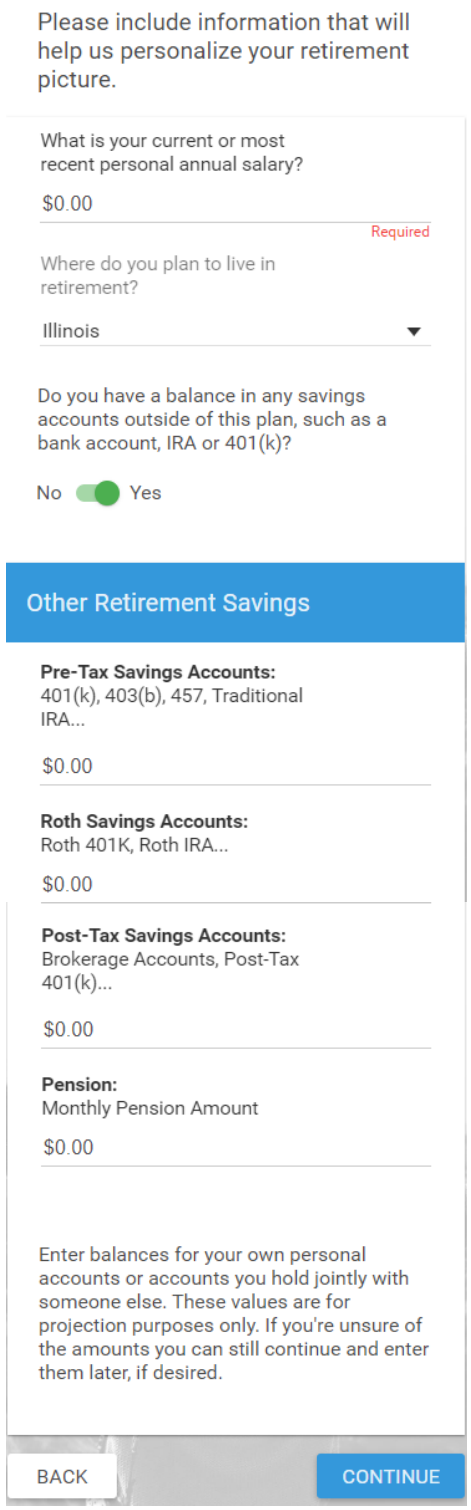
Cell Phone

BACK
CONTINUE

Continue to Step 6 ----->

6

Asset and Retirement Information. To ensure accurate guidance, enter your current salary as well as any current retirement assets that you may have. Click **Continue**.

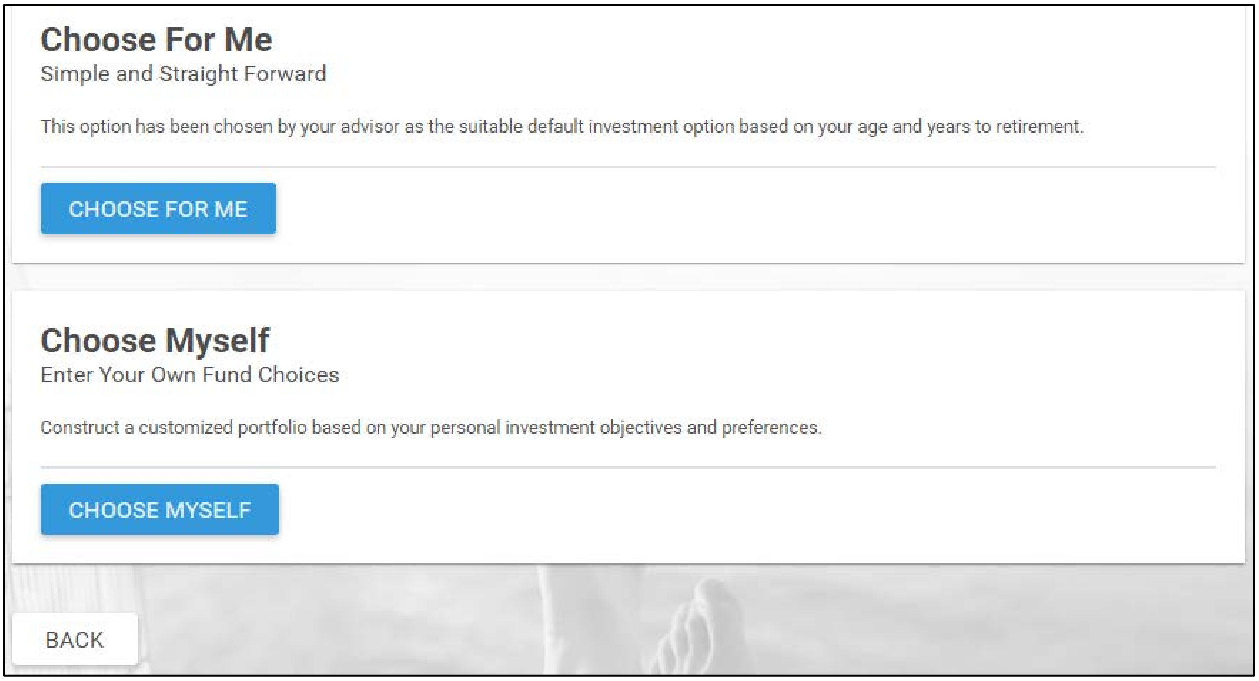


Continue to Step 7 ----->

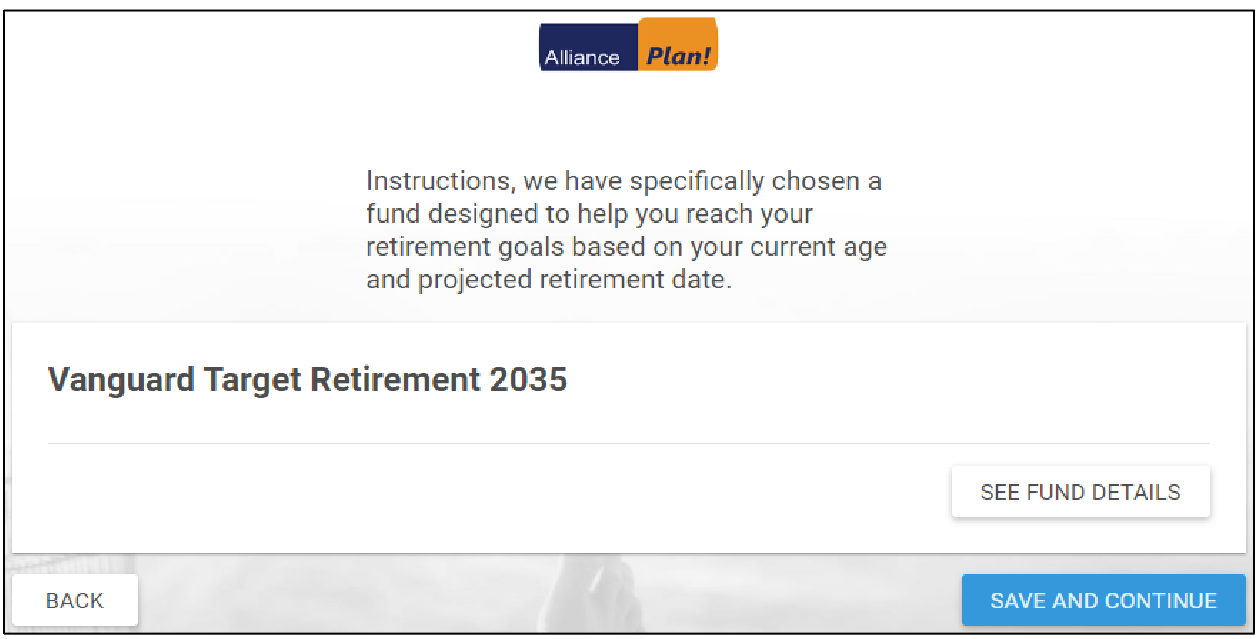
7 **Investment Elections.** There are two paths for choosing your investments:

1. **Choose For Me** will automatically place you into the plan's default investment.

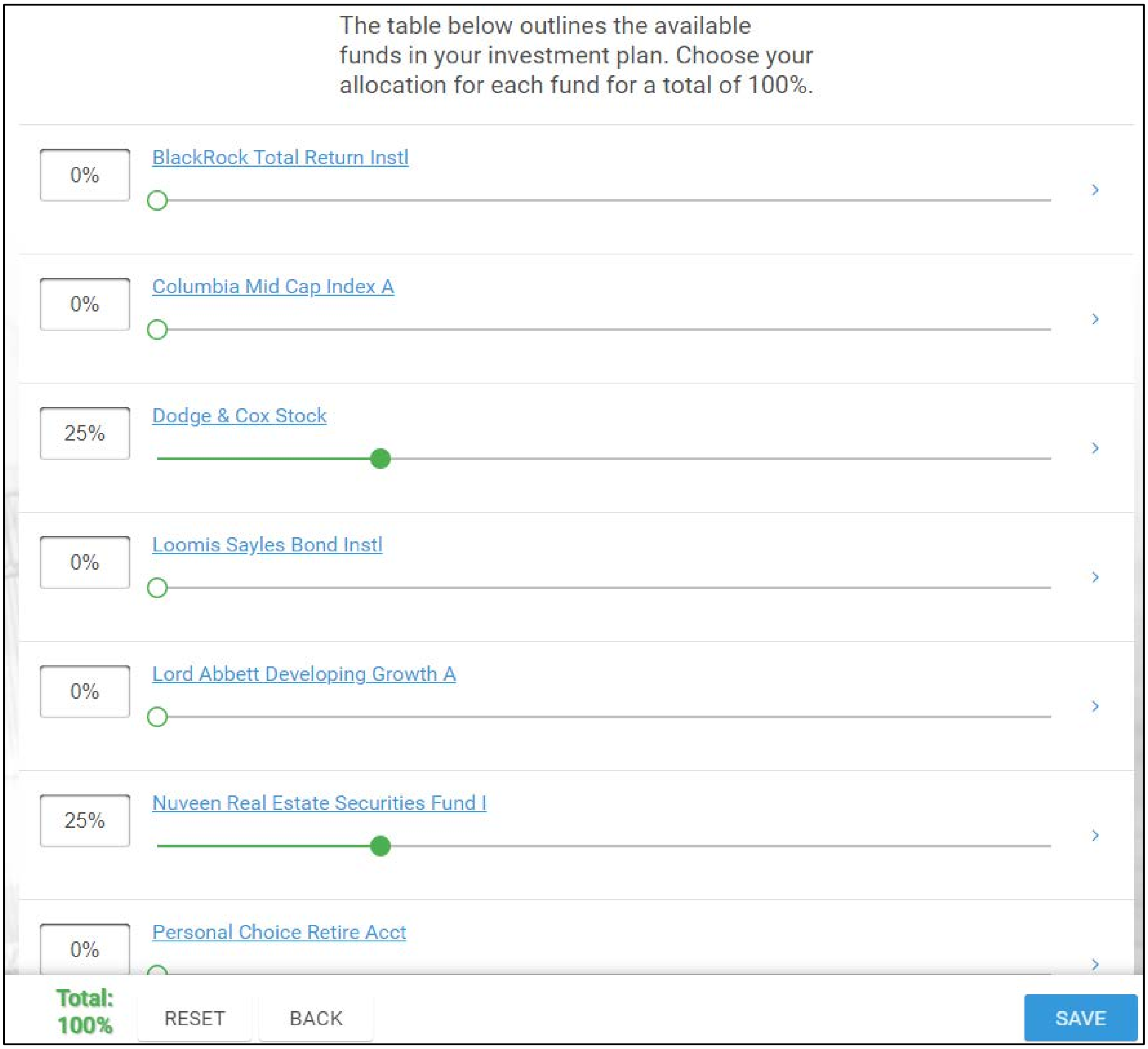
2. **Choose Myself** gives you the option to choose from among the available core fund choices.



Choose For Me – if you select this option, the plan's default investment choice will show on the following screen. Click **Save and Continue** to confirm your election.



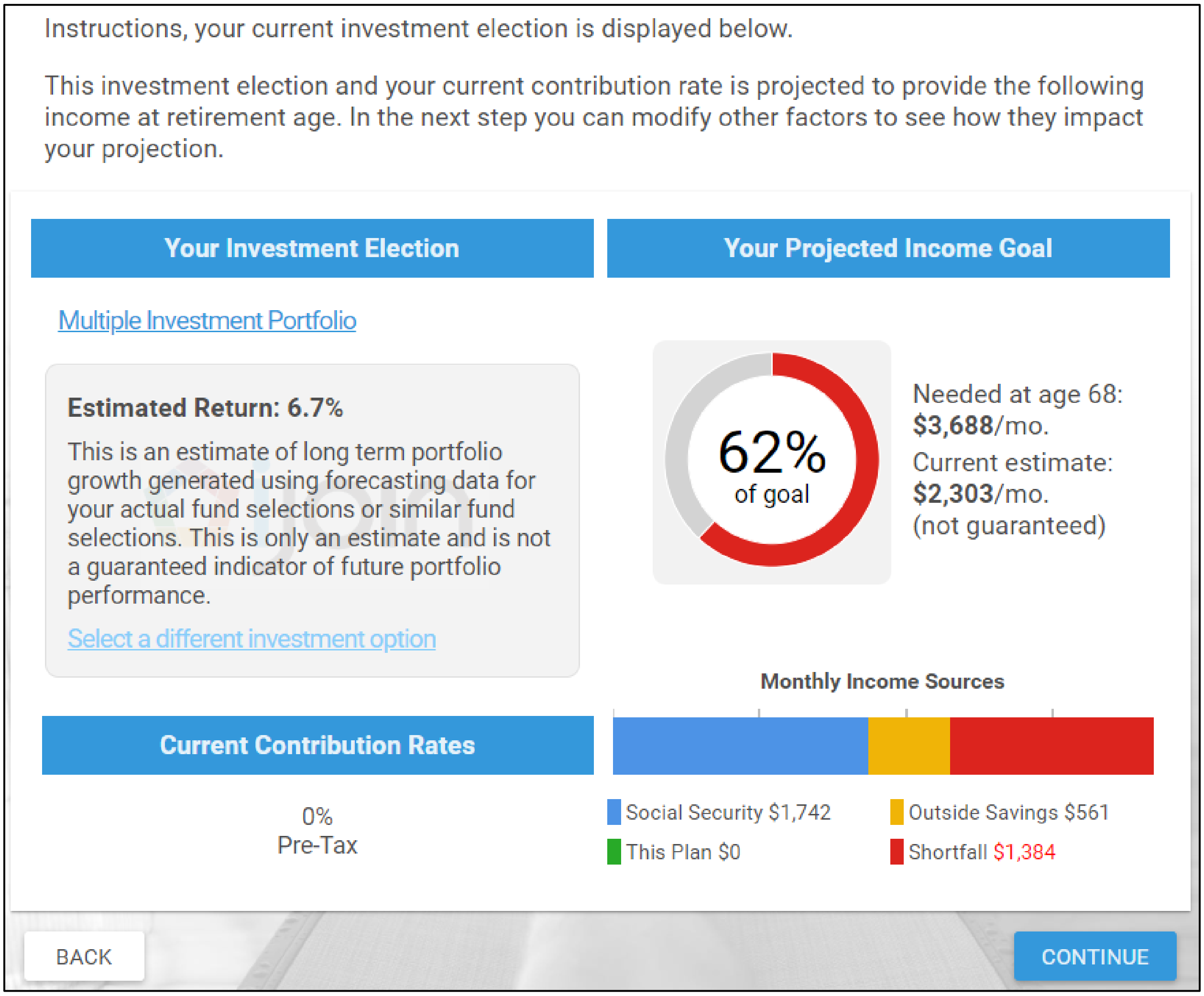
Choose Myself – if you select this option, a list of the available investments will display. You must select whole percentages totaling 100% from amongst the available investment choices. Click **Save** to confirm your election.



Continue to Step 8 ----->

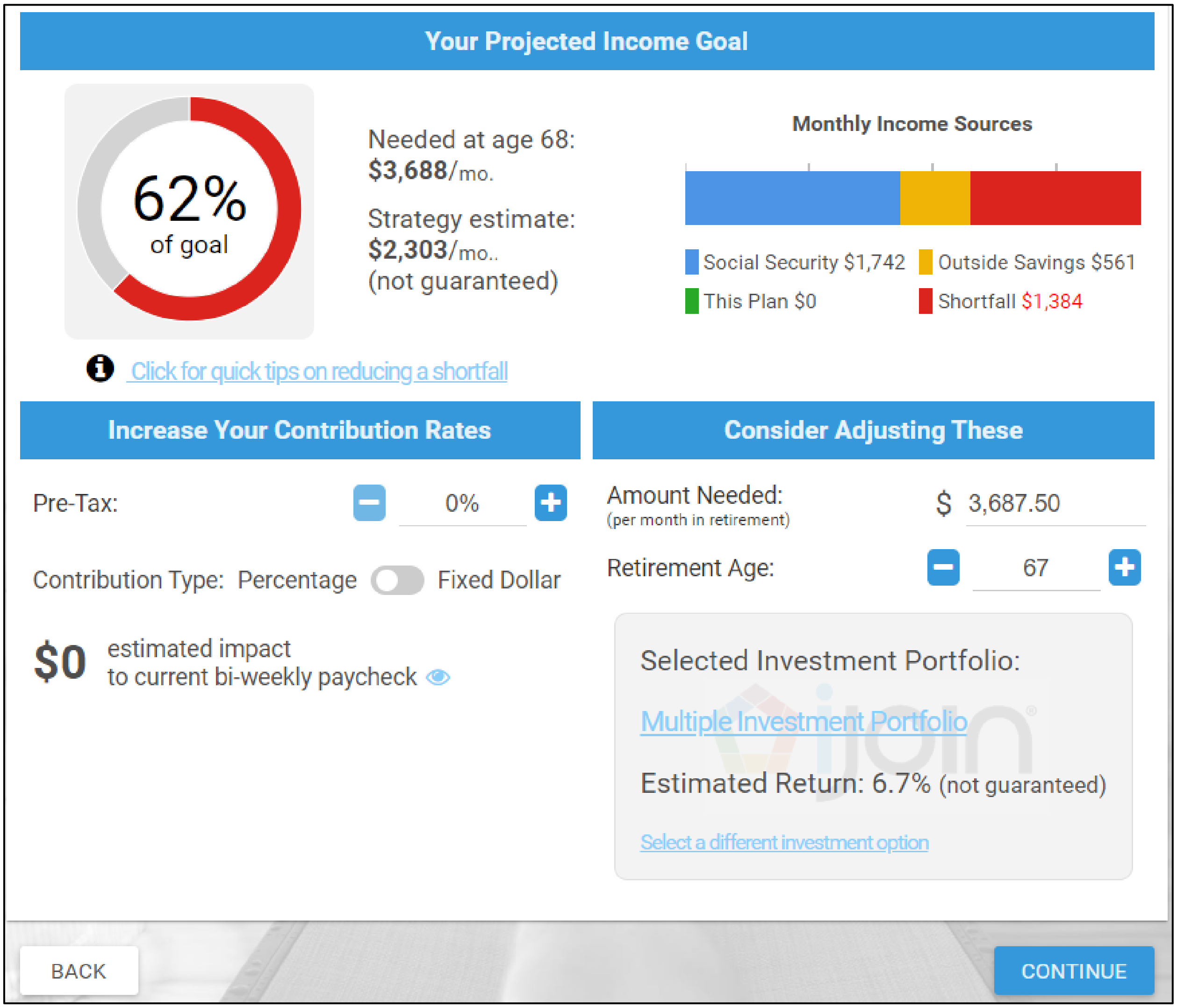
8

Review Your Retirement Projection. Click **Continue** to edit these selections.



Continue to Step 9 ----->

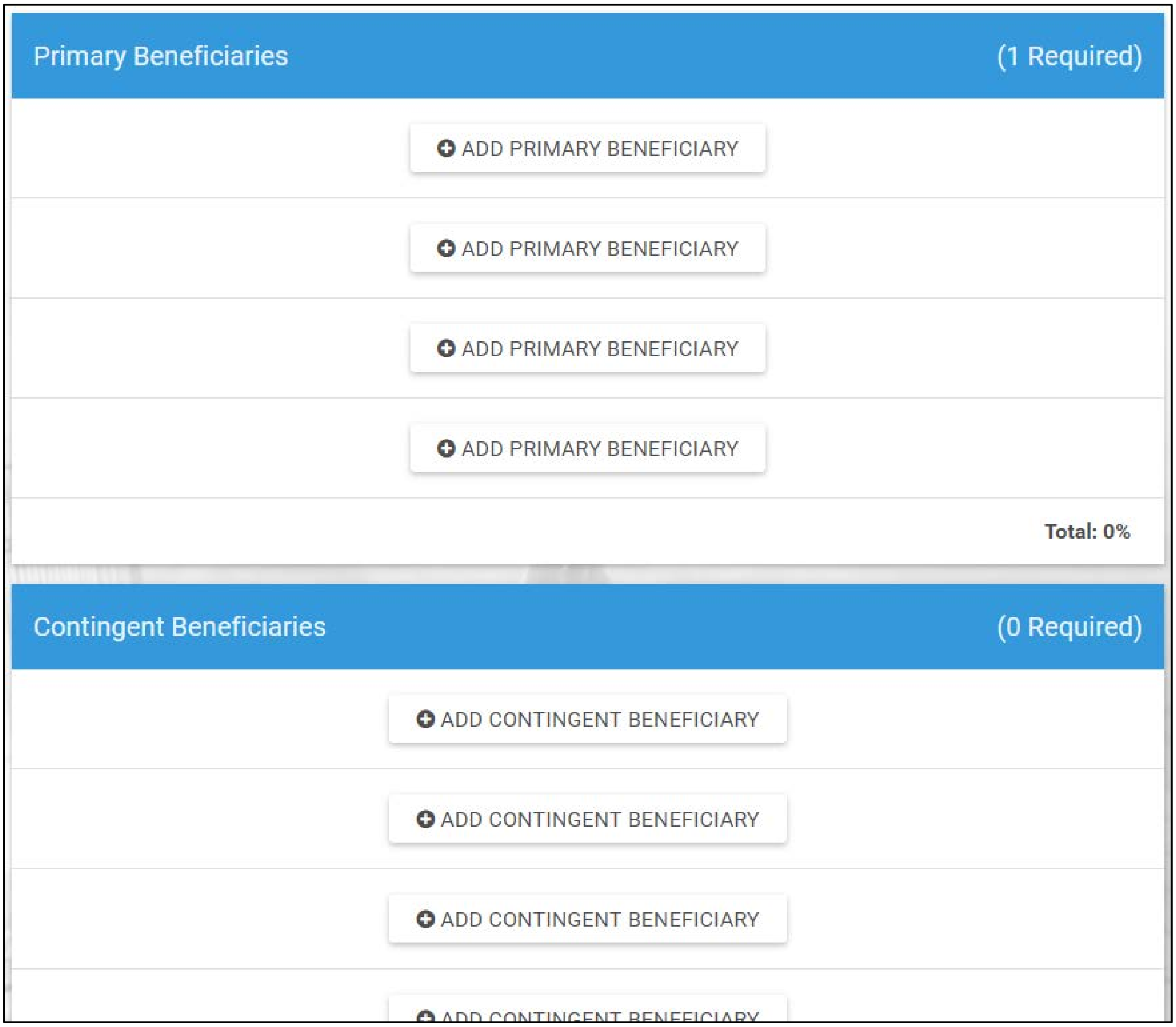
9 **Edit Your Retirement Projection.** This screen is interactive and will update as you make changes. You may update your deferral rate, retirement goals, and/or investments to improve the projection and your retirement outcome. Click **Continue** to confirm your selections.



Continue to Step 10 ----->

10 **Beneficiaries.** Enter Beneficiary Information for primary and secondary (contingent) beneficiaries. Beneficiary totals must add up to 100%. Click **Continue**.

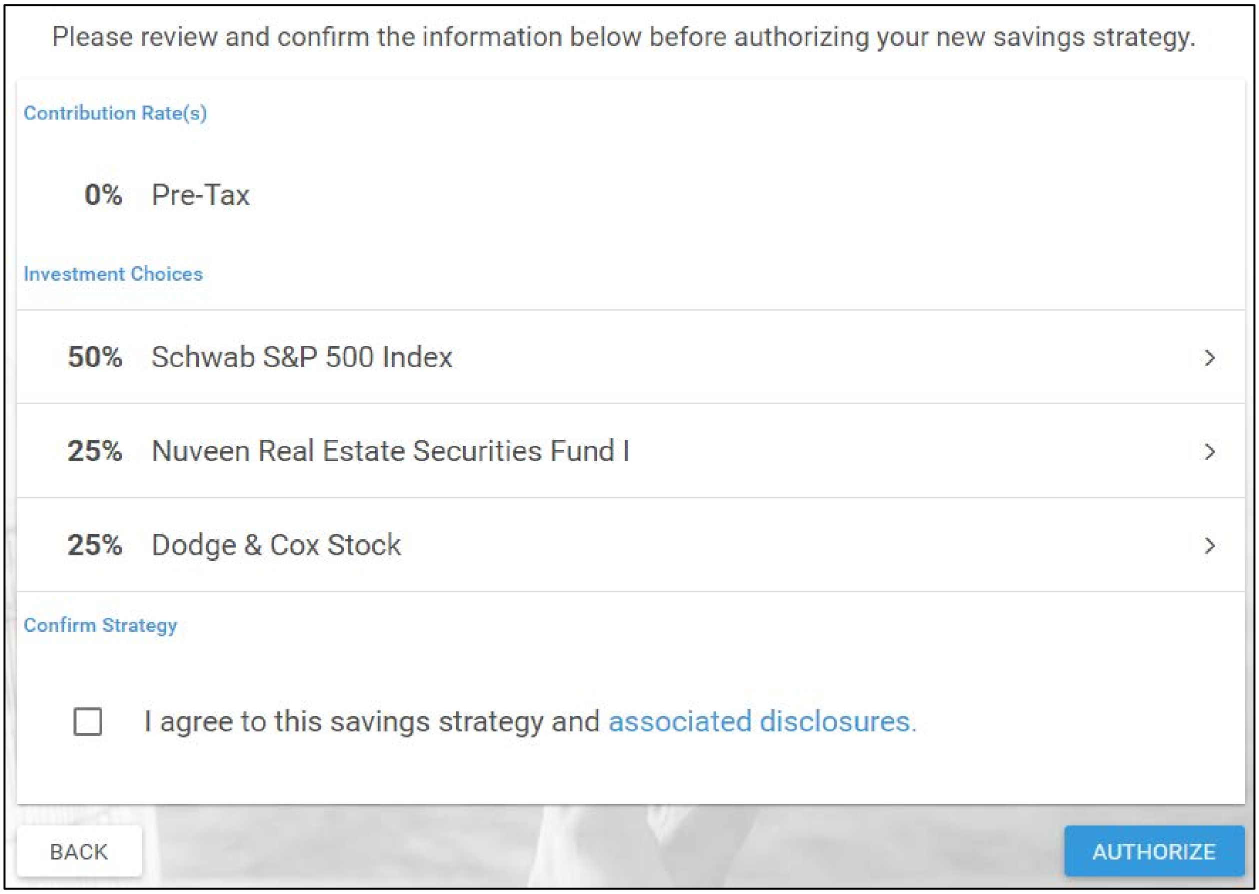
Note: If you are married, spousal consent is *<u>required</u>* *should you designate anyone other than your spouse as your primary beneficiary. Please contact your plan representative for the* ***Consent of Spouse Form and Waiver****. Your spouse must sign this form in the presence of a Plan Representative or a Notary Public.*



Continue to Step 11 ----->

11

Confirmation. Review your entries to verify that they are correct and click **Authorize**.



Alliance ***Plan!***

Participant Support

For those who require additional assistance* - highly trained, knowledgeable, real-live Reps can be reached by calling 800.406.401k to help you

- navigate the ***Plan!*** website www.Alliance-Plan.com
- find forms and documents
- change your contribution rate and investment elections
- transfer between funds
- reset Username and password
- set up or make changes to beneficiary information, and more

After dialing the 800#, press “1” to speak with a live representative.

If you wish to utilize the automated service, you may continue into the automated system by pressing “9” and entering your Social Security Number and Personal Identification Number (PIN) and press #. If you have not established a PIN, it will be the last 4 digits of your Social Security Number.

* *Representatives cannot provide investment or tax guidance or advice and are limited to providing account management assistance.*