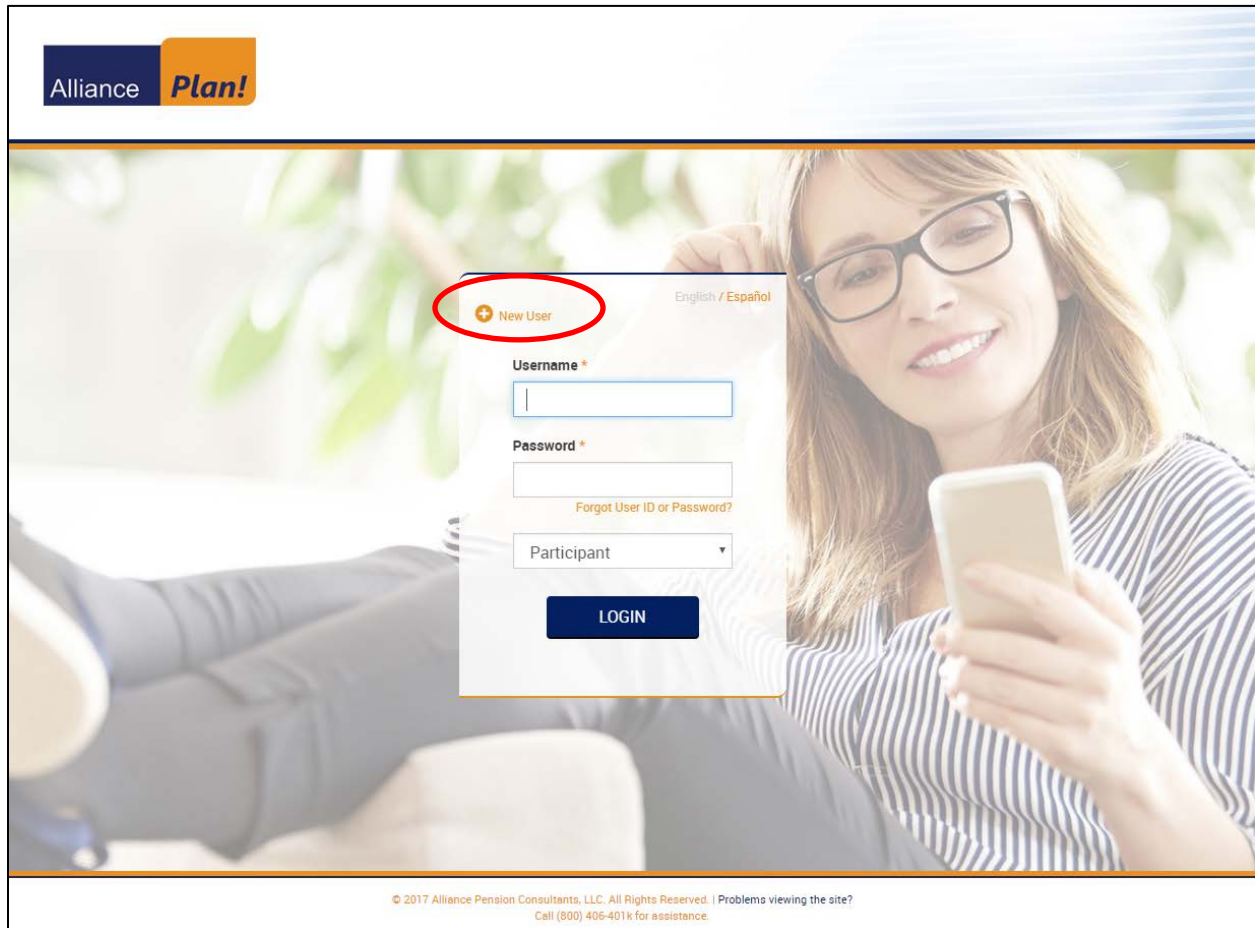


## A Guide to Online Enrollment Instructions for New Web Users

Go to [www.Alliance-Plan.com](http://www.Alliance-Plan.com).

Click on “**New User**” to get started.



The screenshot shows the Alliance-Plan.com website interface. At the top left is the logo with the text "Alliance Plan!". On the right, there is a language selector for "English / Español". The main content area features a registration form with the following elements:

- A link labeled "New User" with a plus icon, which is circled in red.
- A "Username" input field with an asterisk.
- A "Password" input field with an asterisk.
- A link for "Forgot User ID or Password?" below the password field.
- A "Participant" dropdown menu.
- A dark blue "LOGIN" button.

At the bottom of the page, there is a copyright notice: "© 2017 Alliance Pension Consultants, LLC. All Rights Reserved. | Problems viewing the site? Call (800) 406-4011 for assistance."

**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**.

Back English / Español

### New User

SSN# (no dashes) \*

Birth Date (mm/dd/yyyy) \*

Zip Code \*

CANCEL NEXT

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

English / Español

### Request Credentials

Please enter the required info below. A message will be sent to your e-mail address and allow you to view/reset your password.

Note: This is only available if you have previously entered the alternate verification info.

Birth Date

CANCEL 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**.

Alliance **Plan!** Welcome, Test New Participant

## Security Setup

Each time you log in to this site from an unknown computer you will be asked to answer one of these questions as an additional security step. Once you have submitted the question(s) you will be directed into the web site.

### Alternate Verification Questions

<b>Question 1 *</b>	<b>Answer *</b>
Alternate password/quote ▾	<input type="text"/>
<b>Question 2 *</b>	<b>Answer *</b>
Alternate password/quote ▾	<input type="text"/>
<b>Question 3 *</b>	<b>Answer *</b>
Alternate password/quote ▾	<input type="text"/>

**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.

Enrollment steps Print

Overall Progress: **0% Complete**

**i** In order to receive a One-Time PIN, required for authentication while logging into your account, it is important to update your account with any changes in your mobile phone number or email. Mobile phone numbers should be capable of receiving texts. Message & Data rates may apply.

Items marked with an asterisk (\*) must be completed before you can proceed to the next step.

- > Your Personal Information
- > Email
- > Username Information
- > Security Question

RESET NEXT

### 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 required to enter a mobile phone number and confirm that phone can receive text messages.**

Overall Progress: **0% Complete**

**i** In order to receive a One-Time PIN, required for authentication while logging into your account, it is important to update your account with any changes in your mobile phone number or email. Mobile phone numbers should be capable of receiving texts. Message & Data rates may apply.

Items marked with an asterisk (\*) must be completed before you can proceed to the next step.

✓ Your Personal Information

<b>First name</b> Demo	<b>Middle name</b> A	<b>Last name</b> Participant	
---------------------------	-------------------------	---------------------------------	--

**Street address 1 \*** 1751 Lake Cook Rd. **Street address 2** Suite 400

**City \*** Deerfield **State \*** IL **Zip code \*** 60015 **Country**

**Home phone** +1 Phone Number **Receives text messages**  Yes  No

**Office phone** +1 Phone Number **Ext** Extension **Receives text messages**  Yes  No

**Mobile phone \*** +1 Phone Number **Receives text messages**  Yes  No

## 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.

✖ Email

If you would like to receive confirmations of transactions, please fill out the following information:

Home	Confirm home email address
<input type="text"/>	<input type="text"/>
Office	Confirm office email address
<input type="text"/>	<input type="text"/>
Multi-Factor Authentication (MFA)	Confirm Multi-Factor Authentication (MFA) email address *
<input type="text"/>	<input type="text"/>

Where would you like your emails sent? \*

Home    Office    MFA    None    I do not have an email address

I wish to receive my participant statements electronically at the email address specified above    No    Yes

\*Note: Be sure to continue through all steps of the enrollment process until you receive confirmation that your enrollment is complete. If you cancel or close your browser before completing the process, your enrollment will not be processed.

## 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.

✖ Username Information

Establish your Username \*

Establish your Password \*

Re-enter Password: \*

\*Note: Remember your Username and Password. You will need them to access your account via the plan website in the future.

## 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**.


The screenshot shows the top navigation bar with the Alliance Plan! logo and menu items: Dashboard, Market Insight, Documents & Reports, and Plan Selection. The main heading is "New Employee Enrollment" with a "Print" icon. Below it is "iJoin® On-Track Enrollment" and a radio button selection: "I choose to create a personal savings strategy and enroll in the plan using the iJoin On-Track retirement readiness experience." At the bottom are buttons for BACK, RESET, and NEXT.

The close-up shows the "iJoin® On-Track Enrollment" heading, followed by the text: "Enter the iJoin® On-Track retirement readiness experience where you will have to opportunity to quickly and easily make informed savings and investment decisions." Below this is the instruction: "To continue, click 'I agree' and press 'Continue'. Press 'Cancel' to return to the prior page." At the bottom, there is a checked checkbox for "I agree" and buttons for CANCEL and CONTINUE.

***Continue to Step 4 ----->***

4

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



Welcome to iJoin, a personalized enrollment experience that will help you make the most of your savings strategy.

Please click the button below to get started.

**LET'S GET STARTED!**

I DON'T WANT TO ENROLL

By proceeding you agree to these [terms of service](#)



Personalizing Retirement Success

BACK CONTINUE

**Continue to Step 5 ----->**

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 ----->***



**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**.

Please include information that will help us personalize your retirement picture.

What is your current or most recent personal annual salary?

\$0.00

Required

Where do you plan to live in retirement?

Illinois

Do you have a balance in any savings accounts outside of this plan, such as a bank account, IRA or 401(k)?

No  Yes

### Other Retirement Savings

**Pre-Tax Savings Accounts:**

401(k), 403(b), 457, Traditional IRA...

\$0.00

**Roth Savings Accounts:**

Roth 401K, Roth IRA...

\$0.00

**Post-Tax Savings Accounts:**

Brokerage Accounts, Post-Tax 401(k)...

\$0.00

**Pension:**

Monthly Pension Amount

\$0.00

Enter balances for your own personal accounts or accounts you hold jointly with someone else. These values are for projection purposes only. If you're unsure of the amounts you can still continue and enter them later, if desired.

BACK

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**  
Simple and Straight Forward

This option has been chosen by your advisor as the suitable default investment option based on your age and years to retirement.

**CHOOSE FOR ME**

---

**Choose Myself**  
Enter Your Own Fund Choices

Construct a customized portfolio based on your personal investment objectives and preferences.

**CHOOSE MYSELF**

**BACK**

**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.

Alliance **Plan!**

Instructions, we have specifically chosen a fund designed to help you reach your retirement goals based on your current age and projected retirement date.

**Vanguard Target Retirement 2035**

**SEE FUND DETAILS**

**BACK** **SAVE AND CONTINUE**

**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.

The table below outlines the available funds in your investment plan. Choose your allocation for each fund for a total of 100%.

0%	<a href="#">BlackRock Total Return Instl</a>	<input type="range"/>	>
0%	<a href="#">Columbia Mid Cap Index A</a>	<input type="range"/>	>
25%	<a href="#">Dodge &amp; Cox Stock</a>	<input type="range" value="25"/>	>
0%	<a href="#">Loomis Sayles Bond Instl</a>	<input type="range"/>	>
0%	<a href="#">Lord Abbett Developing Growth A</a>	<input type="range"/>	>
25%	<a href="#">Nuveen Real Estate Securities Fund I</a>	<input type="range" value="25"/>	>
0%	<a href="#">Personal Choice Retire Acct</a>	<input type="range"/>	>

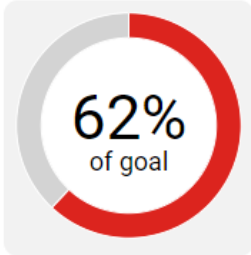

**Total: 100%**    RESET    BACK    **SAVE**

***Continue to Step 8 ----->***

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

Instructions, your current investment election is displayed below.

This investment election and your current contribution rate is projected to provide the following income at retirement age. In the next step you can modify other factors to see how they impact your projection.

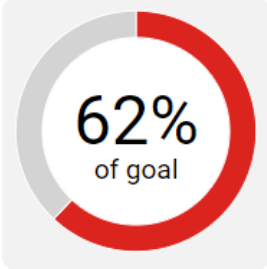
Your Investment Election	Your Projected Income Goal
<a href="#">Multiple Investment Portfolio</a>	
<p><b>Estimated Return: 6.7%</b></p> <p>This is an estimate of long term portfolio growth generated using forecasting data for your actual fund selections or similar fund selections. This is only an estimate and is not a guaranteed indicator of future portfolio performance.</p> <p><a href="#">Select a different investment option</a></p>	 <p>62% of goal</p> <p>Needed at age 68: <b>\$3,688/mo.</b> Current estimate: <b>\$2,303/mo.</b> (not guaranteed)</p>
<p>Monthly Income Sources</p>	
<p><b>Current Contribution Rates</b></p>	
<p>0% Pre-Tax</p>	<p>■ Social Security \$1,742    ■ Outside Savings \$561 ■ This Plan \$0                ■ Shortfall \$1,384</p>
<p>BACK</p>	<p>CONTINUE</p>

**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.

### Your Projected Income Goal




62%  
of goal

Needed at age 68:  
**\$3,688/mo.**

Strategy estimate:  
**\$2,303/mo.**  
(not guaranteed)

#### Monthly Income Sources



Social Security \$1,742	Outside Savings \$561
This Plan \$0	Shortfall \$1,384

**i** [Click for quick tips on reducing a shortfall](#)

#### Increase Your Contribution Rates

Pre-Tax:     Contribution Type: Percentage  Fixed Dollar

**\$0** estimated impact to current bi-weekly paycheck

#### Consider Adjusting These

Amount Needed: (per month in retirement)

Retirement Age:   

Selected Investment Portfolio:

[Multiple Investment Portfolio](#)

Estimated Return: 6.7% (not guaranteed)

[Select a different investment option](#)

**Continue to Step 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 required 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.*

Primary Beneficiaries		(1 Required)
<input type="button" value="+ ADD PRIMARY BENEFICIARY"/>		
<input type="button" value="+ ADD PRIMARY BENEFICIARY"/>		
<input type="button" value="+ ADD PRIMARY BENEFICIARY"/>		
<input type="button" value="+ ADD PRIMARY BENEFICIARY"/>		
		Total: 0%
Contingent Beneficiaries		(0 Required)
<input type="button" value="+ ADD CONTINGENT BENEFICIARY"/>		
<input type="button" value="+ ADD CONTINGENT BENEFICIARY"/>		
<input type="button" value="+ ADD CONTINGENT BENEFICIARY"/>		
<input type="button" value="+ ADD CONTINGENT BENEFICIARY"/>		

***Continue to Step 11 ----->***

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

Please review and confirm the information below before authorizing your new savings strategy.

**Contribution Rate(s)**

0% Pre-Tax

**Investment Choices**

50%	Schwab S&P 500 Index	>
25%	Nuveen Real Estate Securities Fund I	>
25%	Dodge & Cox Stock	>

**Confirm Strategy**

I agree to this savings strategy and [associated disclosures](#).

BACK 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](http://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.*