

your account—anytime, anywhere

web: <https://myaccount.ascensus.com/sharebuilder401k> phone: 866-809-8146

Stay on top of your retirement savings with round-the-clock access to your account. Simply log into your account online or call our Interactive Voice Response (IVR) system using a touch-tone phone.



take advantage of online tools

When you log into your account through our website, you get much more than just your account information. You can also make changes to your account and look up funds, educational material, and a host of other helpful resources.

If you're using our website for the first time, you can sign up by following the “Register here” link.

The screenshot shows the 'sharebuilder 401k' website. At the top is a navigation menu with links: Home, Your Account, Your Plan Investments, Statements and Reports, Learning Center, Your Profile, and Help. Below the menu is a main heading 'Set Your Retirement Goals Now!' with a 'Set My Goals' button. A 'Calculator Disclaimer' is visible. The main content area is titled 'I Want To...' and displays 'Account Details' for a user. The account details include:

- Summary Information:** Total Balance (\$37,058.64), Vested Balance (\$30,931.92), Outstanding Loan Balance (\$0.00), Maximum Amount Available for Hardship Withdrawal (\$0.00).
- Account Balance:** A table showing funds: American Funds EuroPacific Growth Fund A (AEPGX) with a balance of \$34,025.14 (91.81%) and American Funds AMCAP Fund A (AMCPX) with a balance of \$3,034.50 (8.19%). The total balance is \$37,058.64 (100%).
- Account Balance Over Time:** A bar chart showing balances for 06/30/09, 06/30/10, 06/30/11, and 06/30/12.
- Market Information:** A section with a 'View Fund Information' link.
- Contribution Elections:** A table showing 'CONSERVATIVE MODEL (C89994701)' with a 100.00% election percentage.

Callout boxes on the right side of the screenshot point to various features:

- 'Make changes to your account' points to the 'Your Account' menu item.
- 'Discover planning tools and strategies' points to the 'Set My Goals' button.
- 'Review statements and account activity' points to the 'Statements and Reports' menu item.
- 'Research your investment options' points to the 'Your Plan Investments' menu item.
- 'Keep tabs on the market' points to the 'Market Information' section.

sharebuilder 401k

Home Your Account Your Plan Investments Statements and Reports Learning Center Your Profile Help Reset Plan

Advanced Options Fine Tuning Your Goals < Start Over Close

You are on track to reach **57%** of the monthly income you will need in retirement. Adjust the sliders below to see different ways to meet your goals. Hover over the icons for more details.

Contribution Rate: 10 %

Income in Retirement: 85 %

Retirement Age: 67

Investment Return: 5 %

Save my Goals

Projected monthly income \$5,514 per month

\$9,647 per month

Set up retirement scenarios with an interactive calculator

Plan your savings from a central location

Save your retirement goals and track your progress

Get instant projections

get a better handle on your savings

Using our interactive sliders and calculator, you can simulate scenarios based on your contributions, retirement age, and returns to plan your savings.

access your account via phone

For on-the-go accesses to your account, you can also call our IVR system at 866-809-8146 from a touch-tone phone. The IVR system, available in English and Spanish, lets you check your account and authorize basic transactions through menu-guided prompts:

- Enter your 4- to 6-character Personal Identification Number (PIN) when you call
- Select the service you'd like from the menu options to the right

menu options:

- 1 General information/set or reset PIN
- 2 Account balance
- 3 Contributions
- 4 Balance exchange
- 5 Plan loans
- 6 Distributions
- 8 Return to main menu
- 9 End your call
- 0 Speak to a Participant Services Representative

If you're a first-time caller, please follow the prompts to set up your PIN. You will be asked to verify your Social Security Number and your date of birth.

Contact Participant Services for more information on web and IVR access.

People Matter. Quality First. Integrity Always.®

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