# 24/7 Retirement Account Access

web: www.planservices.com/ml phone: 888-800-5359

## managing your retirement account

*easy, convenient web and phone access*

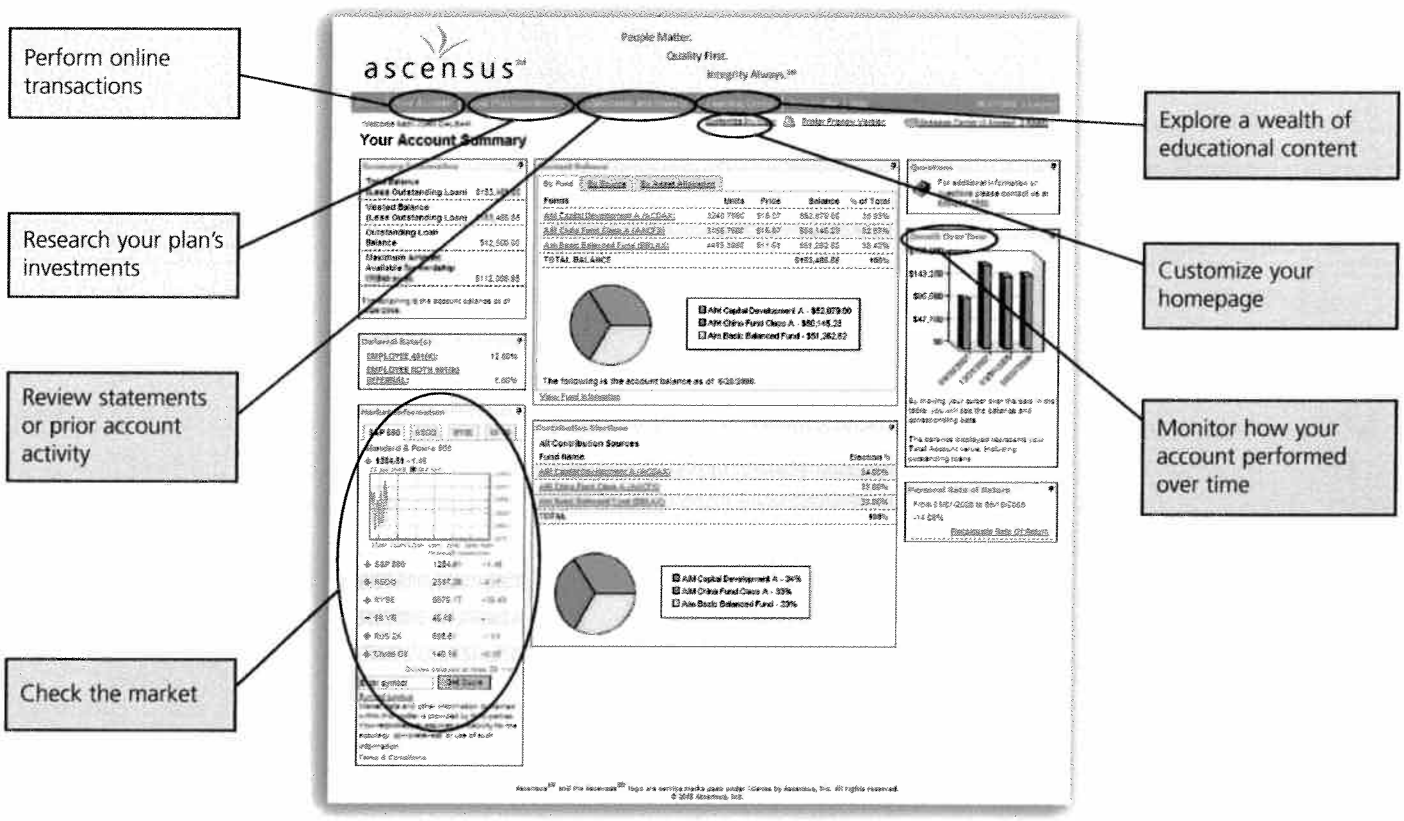
To help you meet your retirement goals, Ascensus makes it easy for you to manage your retirement account—whether you prefer the web or our automated phone system.

The website includes a customizable dashboard view of information used most: real-time market updates, account summary and contribution elections. Our Learning Center provides educational content to help you make investment decisions and simplify managing your retirement account. You can also perform many of the same account management functions through our Interactive Voice Response (IVR) System. To help you get the most value from your retirement plan, Ascensus is dedicated to delivering the tools and services you need.

## web access

Access your secure account at www.planservices.com/ml. After you login, you can customize your homepage as a dashboard to include the features you use most.

***First-time users:***
**Click *Register Here* on the login page and follow the prompts to sign up for account access.**

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## phone access

Call the IVR system at 888-800-5359 from a touch-tone phone to stay connected to your retirement account or complete transactions. To access your account in English or Spanish:

- Enter your 4-6 character Personal Identification Number (PIN)

  ***First-time callers:***
  **Follow the prompts to establish your PIN. You will be asked to provide your social security number and date of birth.**

- Select the menu option you want

### 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

## pick your method: web or IVR[1]

| ***Function*** | ***Web*** | ***IVR*** |
|---|---|---|
| Check account balance | ✔ | ✔ |
| Change deferral rate | ✔ | ✔ |
| Change contribution elections | ✔ | ✔ |
| Request a distribution | ✔ | ✔ |
| Get fund pricing and performance history | ✔ | ✔ |
| Get account activity history | ✔ | ✔ |
| Transfer money between investments[2] | ✔ | ✔ |
| Model and/or request a loan | ✔ | ✔ (Request loan paperwork only) |
| View and print your statement | ✔ | ✔ (Request hardcopy statement only) |
| Obtain a fund fact sheet and prospectus | ✔ | |
| Calculate your personal rate of return | ✔ | |
| Set up automatic account rebalancing | ✔ | |
| Explore educational content | ✔ | |
| Check market information | ✔ | |
| Track account performance over time | ✔ | |

[1]Available features may vary.

[2]Transfer requests received by 4:00 p.m. Eastern Time will be processed at that day's price. Transfers requested after 4:00 p.m. Eastern Time will be processed the next day the stock markets are open.



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