

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.

The screenshot displays the Ascensus retirement account dashboard. The interface includes a top navigation bar with the Ascensus logo and tagline "People Matter. Quality First. Integrity Always." Below this, the "Your Account Summary" section provides a quick overview of account balances and transactions. The "Funds" section shows a pie chart and a table of investment options, including "All Capital Development A", "All Core Fund Class A", and "All Risk Balanced Fund". The "Contribution Sources" section lists various contribution types and their percentages. The "Market Information" section displays a line chart for the S&P 500 and other market indices. The "Performance" section shows a bar chart of performance over time. The "Check the market" callout points to the market information section. The "Perform online transactions" callout points to the top navigation bar. The "Research your plan's investments" callout points to the funds section. The "Review statements or prior account activity" callout points to the performance section. The "Explore a wealth of educational content" callout points to the top navigation bar. The "Customize your homepage" callout points to the top navigation bar. The "Monitor how your account performed over time" callout points to the performance section.

Perform online transactions

Research your plan's investments

Review statements or prior account activity

Check the market

Explore a wealth of educational content

Customize your homepage

Monitor how your account performed over time

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 IVR¹

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	✓	

¹Available features may vary.

²Transfer 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.