

ADVISOR PORTAL GUIDE

D A S H B O A R D W A L K T H R O U G H

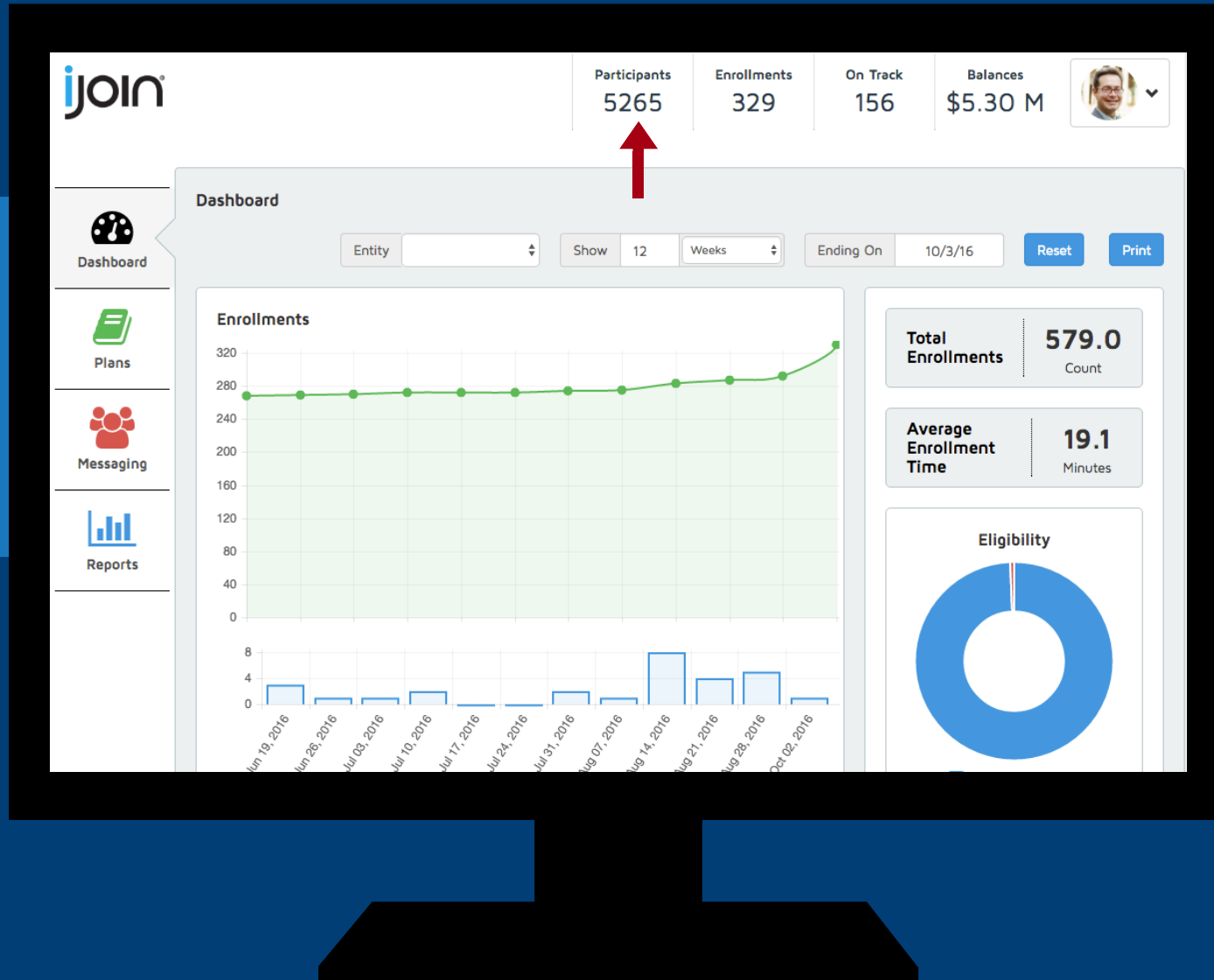
A D V I S O R . 4 0 1 K . C O M

YOUR DASHBOARD



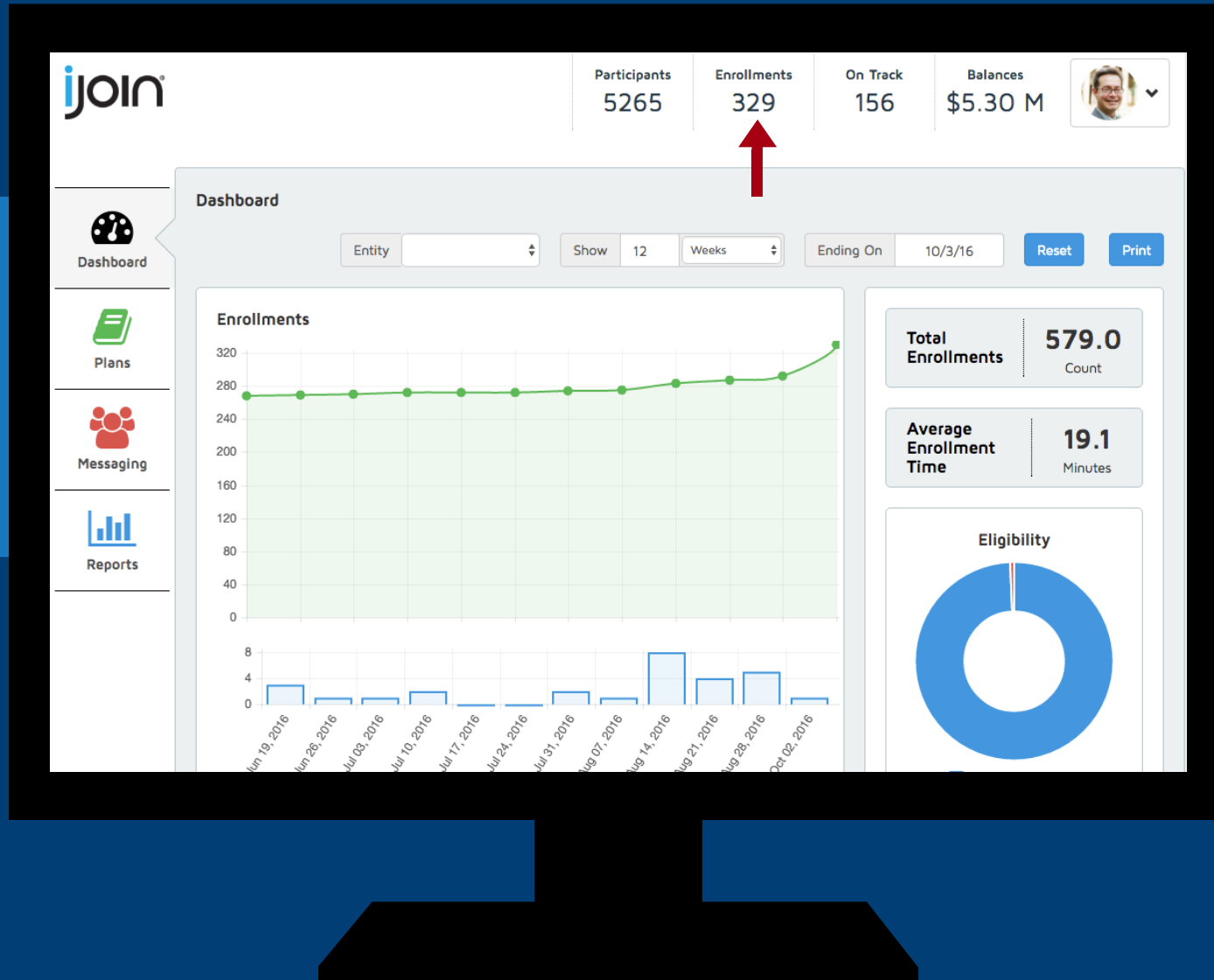
The Dashboard helps you understand participant data through charts + graphs.

PARTICIPANTS



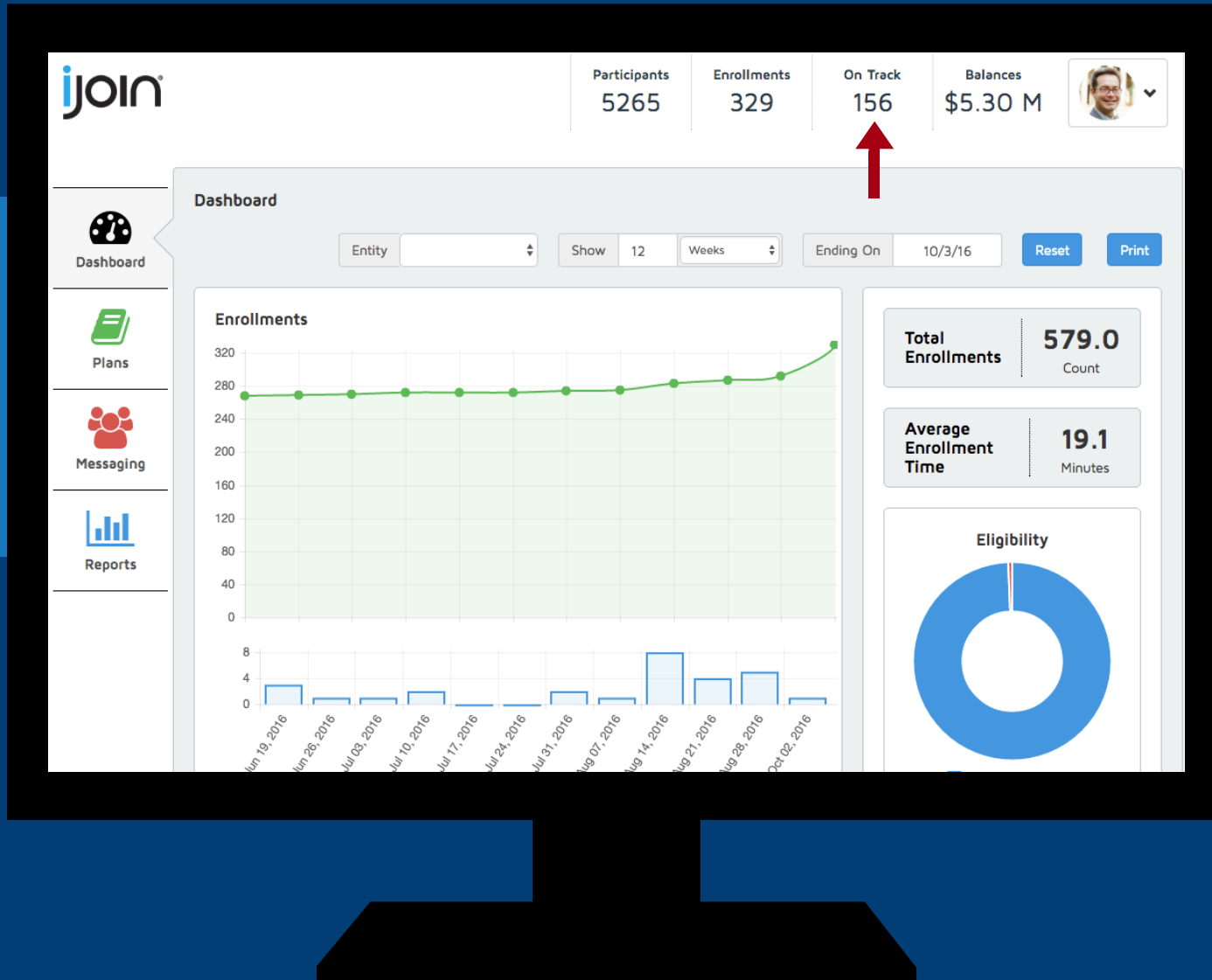
The number of unique + eligible participants across all revisions of the plan.

ENROLLMENTS



The number of unique enrollments across all revisions of a plan. Participants who enroll multiple times are counted as a single enrollment.

ON TRACK



The number of enrolled participants who are on-track with the plan's retirement goals.

BALANCES



The sum of the most current known balance for each participant.

PERFORMANCE GRAPHS



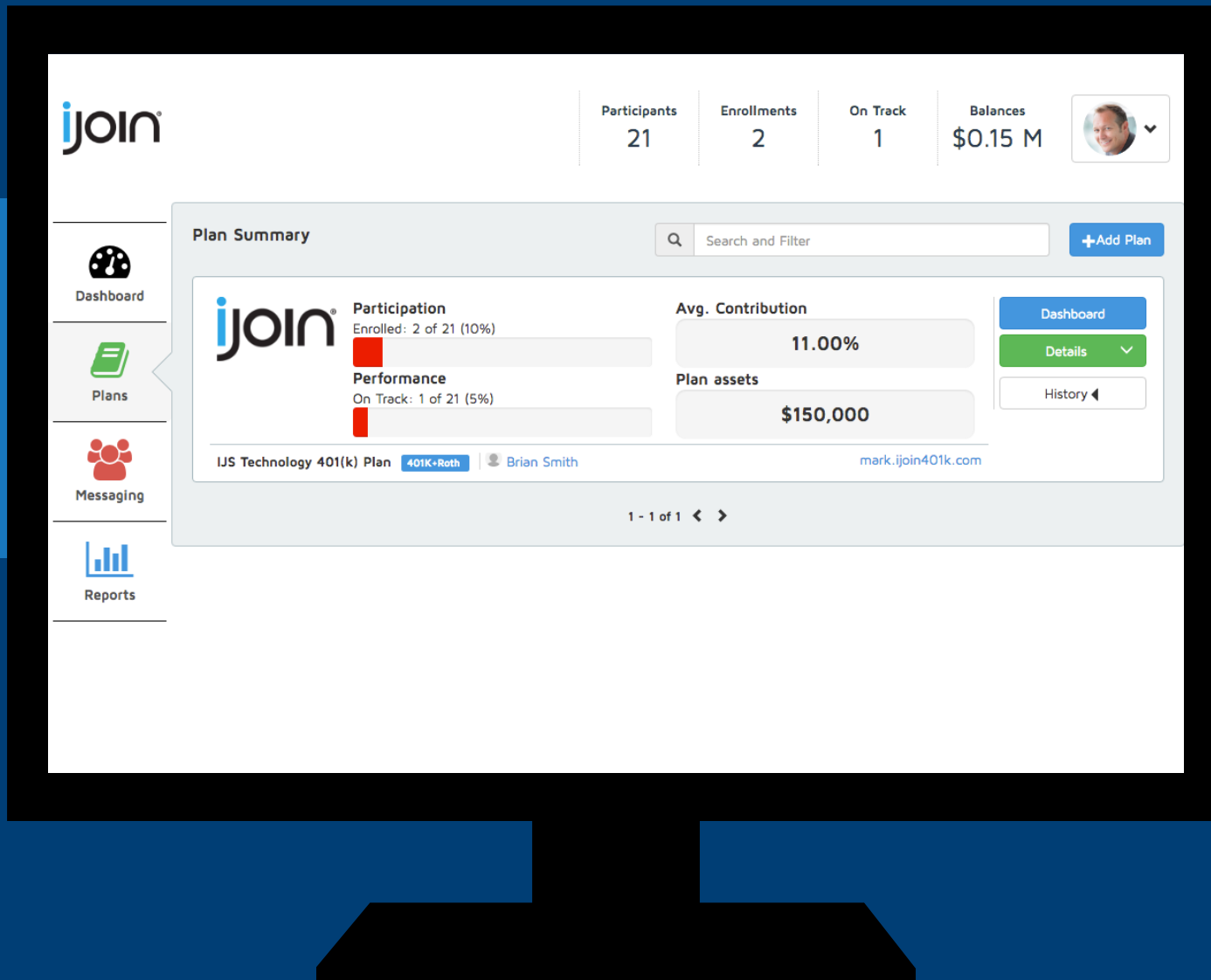
Average Contribution Rate over Time , Participants on Track over Time, Balances +
Rollover Eligible plans

DEMOGRAPHIC CHARTS



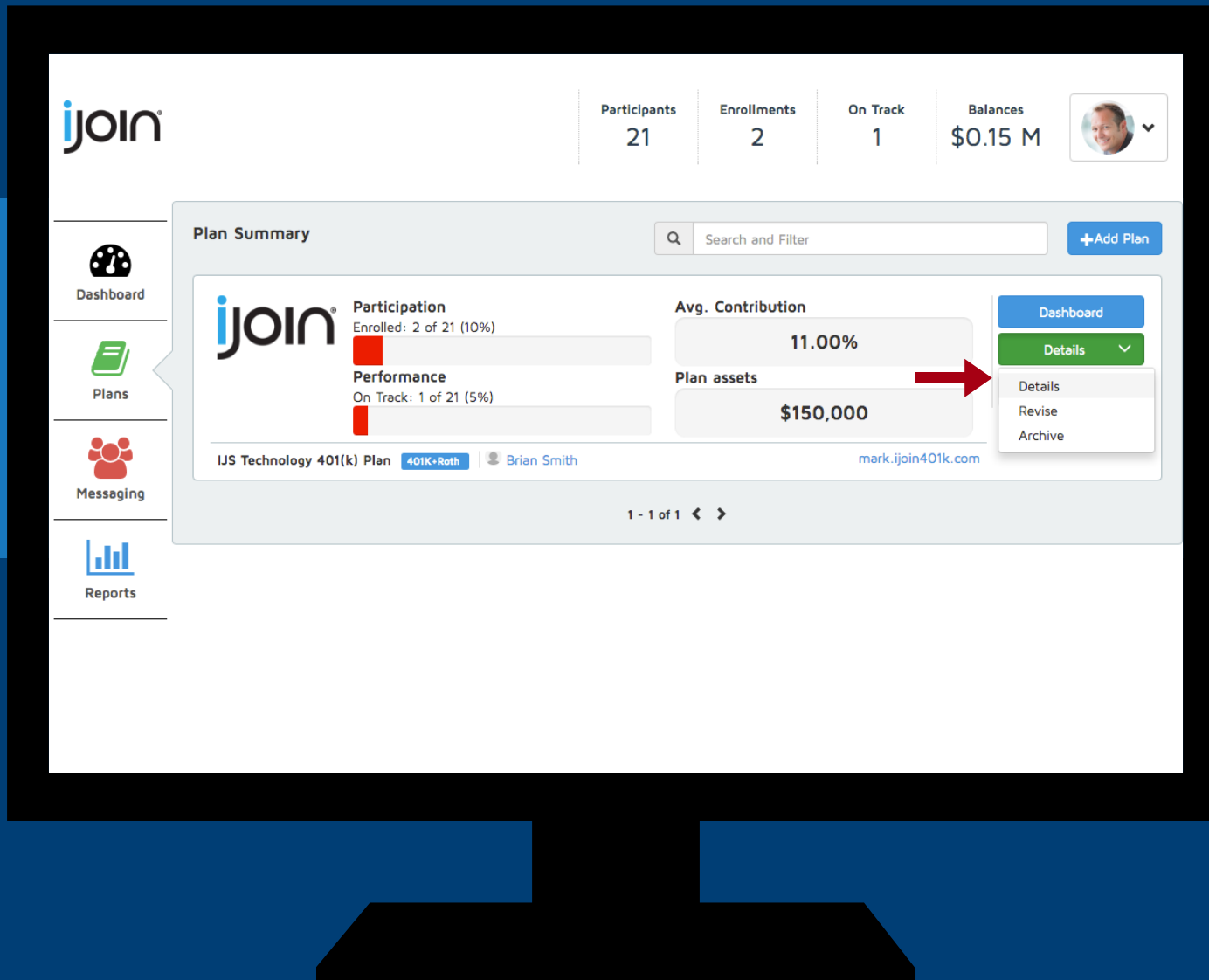
Participant versus Enrollment Age + Gender Demographics

PLANS



The Plans Tab enables you to view all the plans at a glance.

PLAN SUMMARY



To view information on a specific plan, click on the plan itself or click "Details" > then, "Details" again

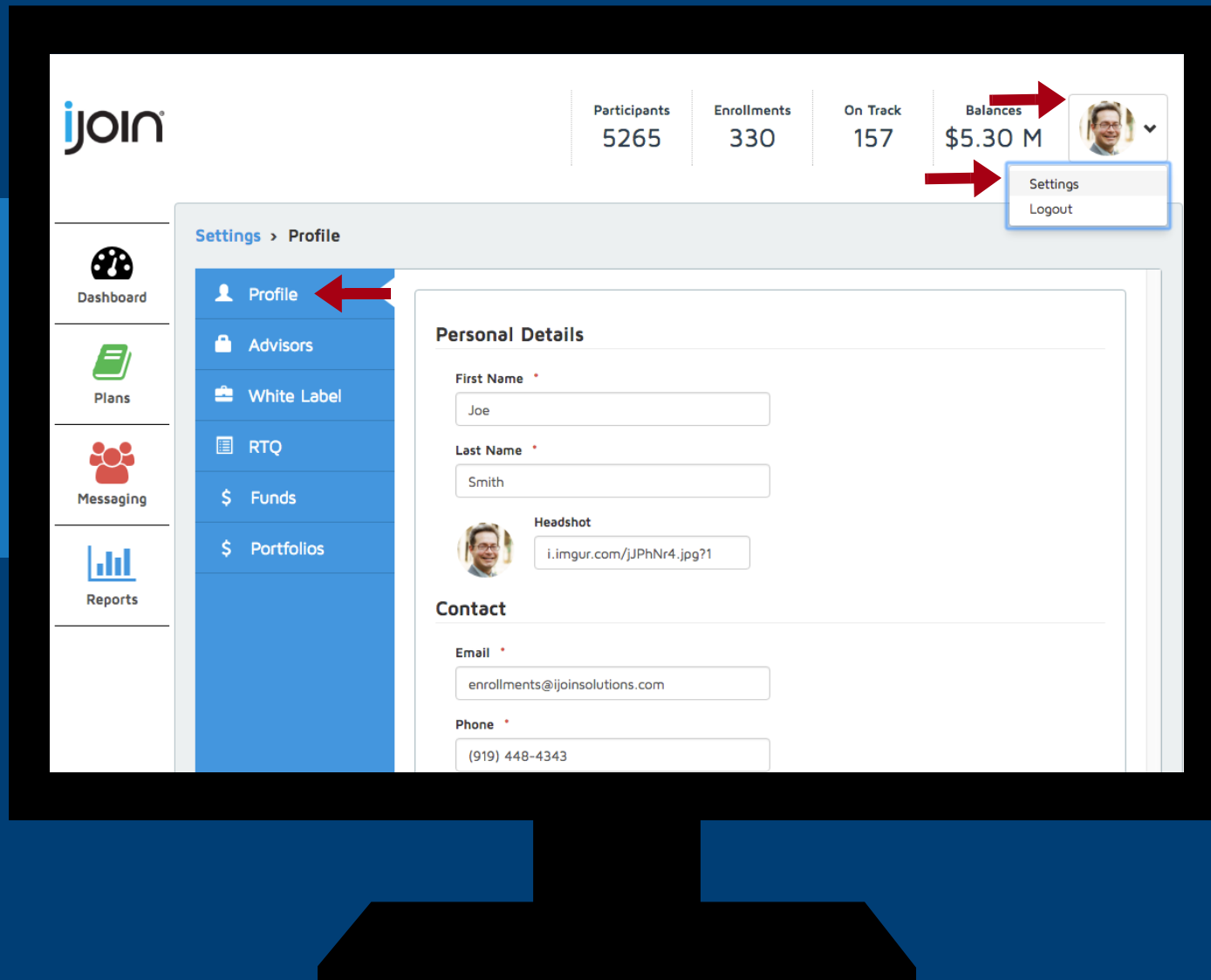
PARTICIPANTS

The screenshot displays the iJoin web application interface. At the top, a navigation bar includes the iJoin logo and summary statistics: 21 Participants, 2 Enrollments, 1 On Track, and Balances of \$0.15 M. A user profile picture is also visible. Below this, a breadcrumb trail reads: Plan Summary > IJS Technology 401(k) Plan - LIVE > Participants. A left sidebar contains icons for Dashboard, Plans, Messaging, and Reports. A blue side panel lists navigation options: Plan Details, Setup, IJS 401k with Roth, Finalize Setup, Integration, Participants (highlighted with a red arrow), Sessions, Customize, and Approval. The main content area shows a table of participants with columns for Name, SSN, Age, Gender, Date of Hire, Savings Rate, Enrollment(s), Balance, and Updated. The table lists seven participants, each with a progress bar indicating their savings rate relative to a target.

Name	SSN	Age	Gender	Date of Hire	Savings Rate	Enrollment(s)	Balance	Updated
Priscilla Brown	XXX-XX-4127	59	F	November 17, 2006	78%	0	\$37000	13 days ago
Rosalie Vargas	XXX-XX-4152	48	F	August 17, 2015	27%	0	\$19000	13 days ago
Lora Barton	XXX-XX-6212	37	F	July 13, 2011	13%	0	\$16000	13 days ago
Joy Gross	XXX-XX-7970	43	F	December 26, 2005	19%	0	\$19000	13 days ago
Terrell Day	XXX-XX-1999	49	M	August 13, 2012	33%	0	\$2000	13 days ago
Dana Henderson	XXX-XX-1654	22	F	November 28, 2011	4%	0	\$44000	13 days ago
Claudia Howell	XXX-XX-2201	23	F	August 13, 2005	5%	0	\$42000	13 days ago
Ricardo	XXX-XX-	42	M	April 19,	18%	0	\$3000	13 days

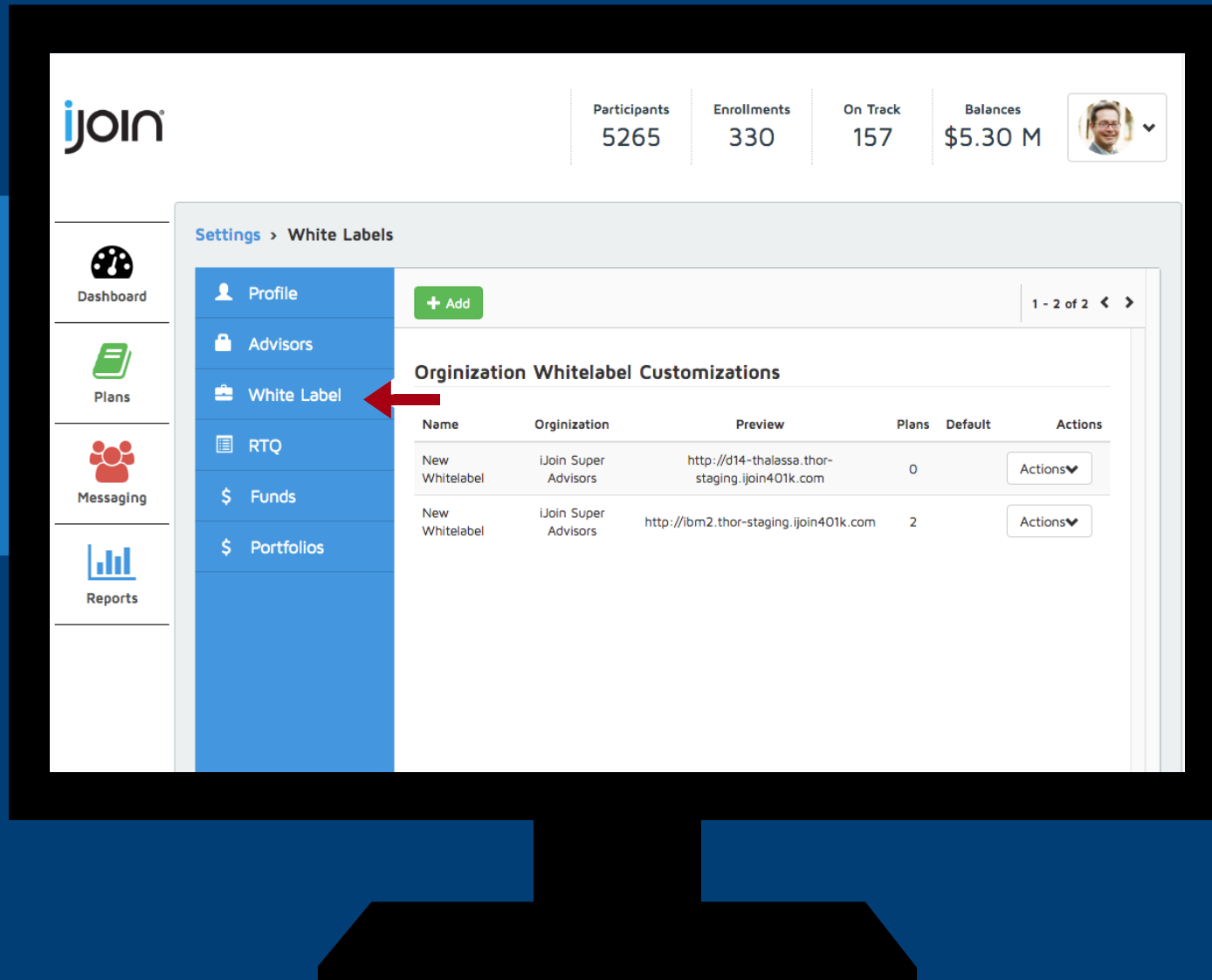
All enrolled participants can be viewed under the Plan Tab after selecting your desired plan by clicking "Participants" in the blue side panel.

PROFILE



To access the Profile, click the advisor photo > "Settings" > "Profile" tab. The profile lists the personal information of the advisor.

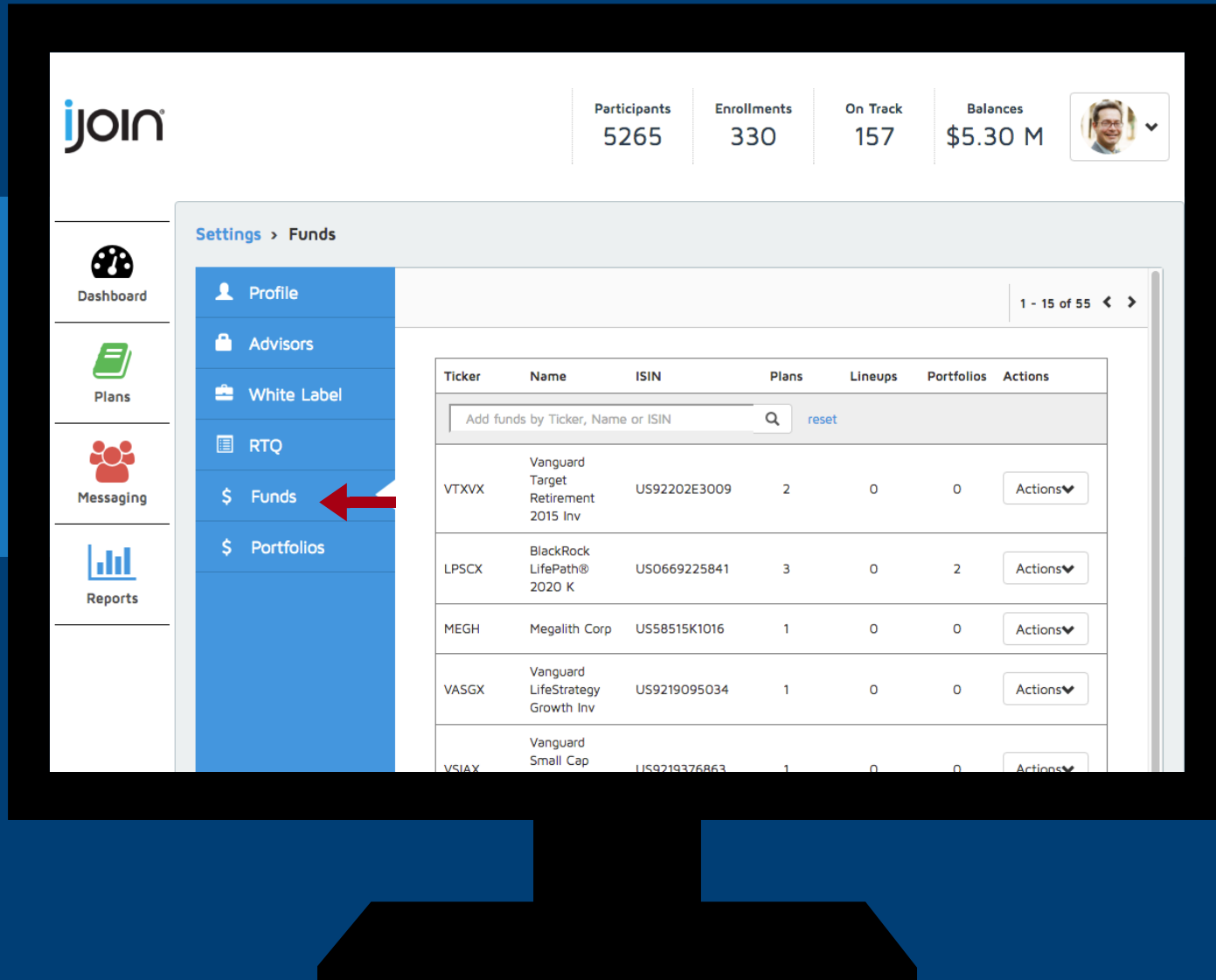
WHITE LABEL



To access the White Label, click the advisor photo > "Settings" > "White Label" tab.

The White Label is customizable.

FUND LIST



To access the Funds, click the advisor photo > "Settings" > "Funds"