

Managing your retirement account

	wellsfargo.com	Wells Fargo Mobile app	Retirement Service Center
Enroll in the plan	•		•
Check your balance*	•	•	•
Change your contribution amount	•	•	•
Select/change investments	•		•
View account history	•	•	•
Update/add beneficiaries	•		•
Check to see if you're on track	•		•
Review your rate of return	•	•	•
Free retirement consultation			•

*Refer to the Plan Document for your plan specific features.



First time accessing your account online?

Follow these steps to register from a computer or smartphone.

1. Go to **wellsfargo.com**. From a computer select **Sign Up** at the top of the page; from a smartphone select **Enroll in Wells Fargo Online**.
2. Enter the requested information requested.
 - If you don't have another Wells Fargo account, check the box noting you don't have an account number.
 - If you do have another Wells Fargo account, such as a checking account, mortgage, or credit card, enter the account number.
 - Select **Continue**.
3. Accept the Wells Fargo E-sign Consent & Online Access Agreement and select **Continue**.
4. Create a username and password and select **Continue**.
5. Validate your email address:
 - a. Look for an email from Wells Fargo with the subject line "Validate Your Email Address."
 - b. Find 6-digit validation code.
 - c. Go back to the website and click **Enter Validation Code**.
 - d. If you don't have access to the validation code while going through the re-registration process, select on **Remind Me Later** to continue.
6. **Select your plan name and access the online Dashboard.** To set up your customization wizard and select e-preferences, make sure you are logged in using a computer.

Note: You may be asked additional security questions the next time you access your account online.

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When it comes to saving, have a plan — check out the online Dashboard

Many experts suggest saving at least 80% of your annual income for each year you may spend in retirement. Viewable after you sign on to your account, the Dashboard provides an easy way to see if you're on track to meet this 80% replacement goal. You can even add retirement savings you might have outside your retirement plan to give you a more complete view.

Tools to help you take the next step

- Interactive calculators: wellsfargo.com/planningtools
- Retirement Quick View calculator: wellsfargo.com/quickview
- Risk Tolerance Quiz: wellsfargo.com/riskquiz
- Blogs and social media: blogs.wellsfargo.com



Manage your account using your smartphone

Go to wf.com to download a free mobile app for your Apple, Android, Windows smartphone, or tablet. Or, just use the mobile website. If you have other Wells Fargo accounts online, like a checking or savings account, you can view these accounts too, all in one place using the same username and password.

Check your account balance by text message

Text us, and we'll reply with your retirement plan account balance. To learn more and sign up for this functionality, access your account at wellsfargo.com from a computer and select the **Account Services** tab. From the Mobile Banking section, select **Set Up/Modify Mobile Banking**.



Call us

1-800-SAVE-123 (1-800-728-3123)

The Retirement Service Center offers 24-hour automated account access. Representatives are also available Monday through Friday from 5:00 a.m. to 9:00 p.m. Mountain Time.

Retirement Consultation

Our trained retirement specialists will conduct a brief, one-on-one phone consultation, to understand your vision for retirement and help you estimate what you should consider saving.



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