

403(b)

RETIREMENT
PLAN

ONLINE ENROLLMENT for GOODWILL INDUSTRIES OF CENTRAL TEXAS

Congratulations, you are eligible to enroll in the Goodwill Industries of Central Texas 403(b) plan!

Getting Started - Follow the steps below to **create your online access**.

1. Go to alerusrb.com and click **Log in** or click the link in your welcome email. Under the dropdown select **My Alerus** and click **Go**.
2. The first time you log in, you will need to set up online access by clicking **Sign Up** or **Set up online access**. To begin, you will need your Social Security Number, Date of Birth, and Personal Email Address. For account verification you will also need your Alerus Retirement Plan Number: **617028**
3. To set up your account, fill out the information required and create a username and password and then click **Create Account**. Click **Accept** for the electronic consent form and terms and conditions.
4. On the next screen you will select your phone number and preferred method of verification (text or phone call) and click **Submit**. Retrieve the six digit code sent via text or call, enter it, and click **Submit**.
5. From the MY ALERUS dashboard select the **Goodwill Industries of Central Texas 403(b) TDA Plan** in the dashboard under **Accounts** and click on **Quick Links**.
6. Once logged in you'll be directed to the Alerus Online Enrollment page.

STEP 1 BEGIN ENROLLMENT

Once you have created your account, you can log in and access your 403b account in the dashboard under Accounts. To begin, review your personal details for accuracy and enter your current annual salary and payroll frequency. Contact human resources if you need to make changes to your Profile Summary or Enrollment Status.

STEP 2 SET UP CONTRIBUTION DEDUCTIONS

For *EACH* money source listed (pre-tax and Roth), enter your desired future deferral amount. If you do not wish to contribute to a money source enter 0 for that source. Click **Next**. If the **Next** button is inactive, you have not made all necessary elections. Always be sure to verify that your selections are correct before clicking Next.

STEP 3 SET INVESTMENT ALLOCATIONS

Choose your future contribution investments. You can choose an investment that is based on your age by entering 100% for the investment option that matches the date range for your date of birth. You also have the option to create your own investment allocation from the list of options. *All allocations must be whole percentages and be sure your choices add up to 100%*. When 100% of your future contributions have been allocated the Next button will become active. Click **Next**. Review your choices and click **Back** to make corrections.

(If you would like individual investment help for your 403b, please contact Strategic Retirement Partners at support@srpretire.com or 512-222-4174).

STEP 4 SET UP BENEFICIARY

Answer the questions regarding your marital status and your intended beneficiary. Click **Next**.

Provide the details for your primary beneficiary first. Click **Done**.

Complete the details for your secondary beneficiary. Click **Done**.

Click **Back** to make changes or to start over.

STEP 5 COMPLETE YOUR ENROLLMENT

Review your contribution election(s), investment election(s), and beneficiary election(s). Double-check your selections carefully to ensure they are correct on the verification screen. The final step is to click **Finish**. Your enrollment is NOT complete unless you click this! When you have successfully enrolled in the plan, all Enrollment Steps will say **Completed**.

Questions about enrolling online? Contact Alerus directly at 855-525-3787

GOODWILL INDUSTRIES OF CENTRAL TEXAS

403(b) Plan

Need Help?

WHO DO YOU CONTACT FOR HELP WITH
YOUR 403(B) ACCOUNT?

GOODWILL INDUSTRIES OF CENTRAL TEXAS - HUMAN RESOURCES

Contact your human resources department at 512-637-7100 or humanresources@goodwillcentraltexas.org for help with:

- Updating your address
- Changing your name
- Updating your employment status
- Correcting your Social Security Number or Date of Birth

STRATEGIC RETIREMENT PARTNERS

Contact Strategic Retirement Partners at 512-222-4174 or support@srpretire.com for help with:

- Selecting investments for your 403(b)
- Deciding how much to save for retirement
- Choosing pre-tax vs. Roth 403(b) contributions
- ANYTHING financially related

ALERUS

Contact Alerus at 855-525-3787 or visit alerusrb.com for help with:

- Accessing your account online
- Checking your account balance
- Requesting a loan/distribution
- Reviewing or changing your savings rate
- Setting and tracking your savings progress

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Descriptions of plan features and benefits are subject to the plan document, which will govern in case of inconsistencies.

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