What's new in BenefitsForYou.com

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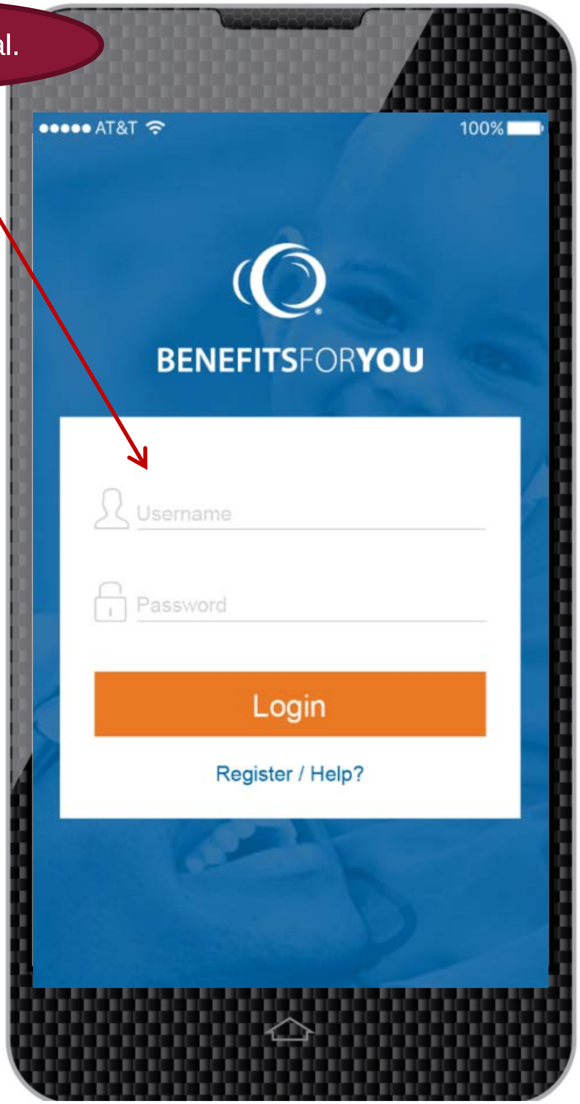
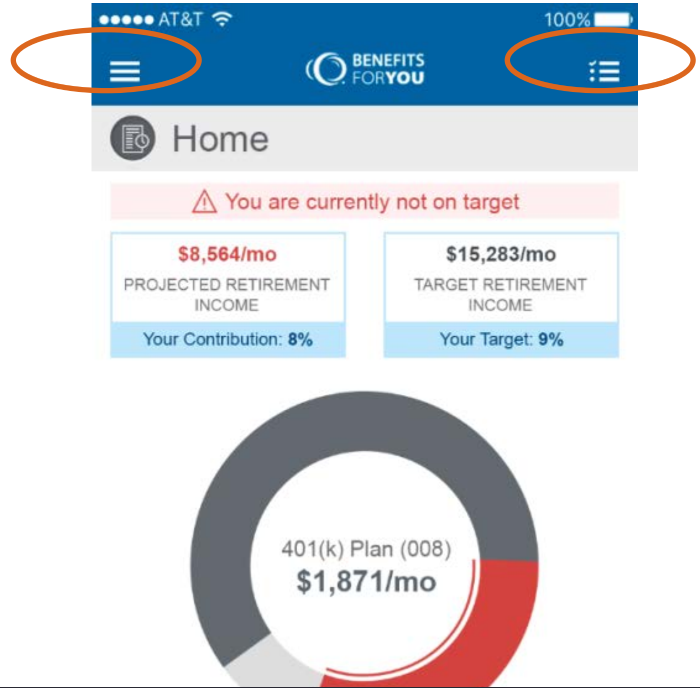
Login & Home Page: Sample screens

Login as usual.

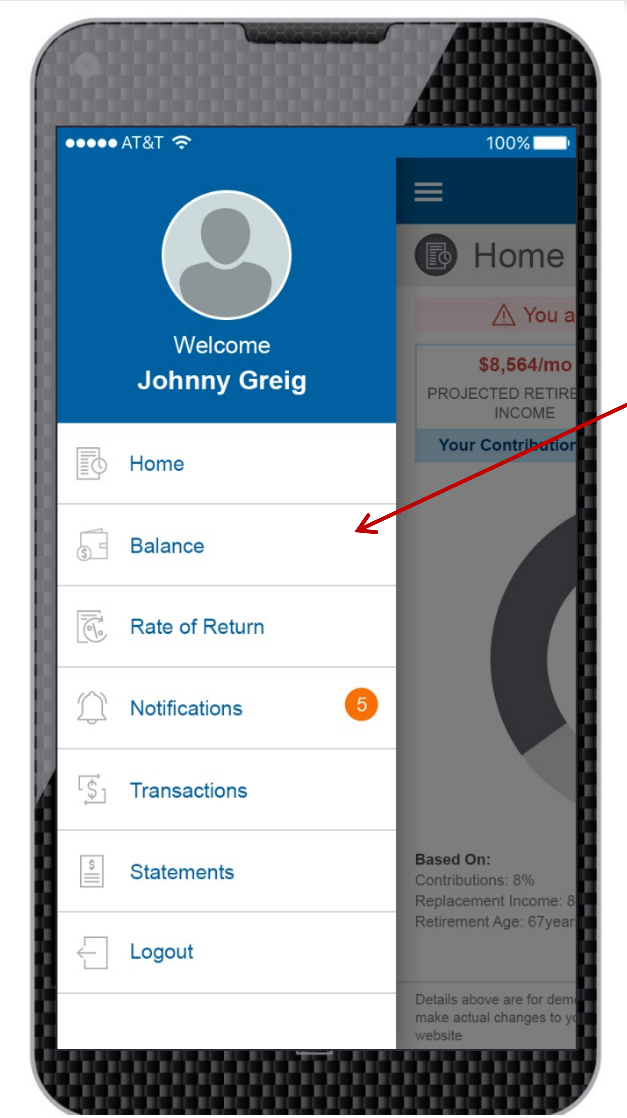




Mobile App Functionality (December)

- Sign in and see RetireOnTarget home page
- Participants use upper left menu for options pertaining to their account
- Participants use upper right menu to access plan information

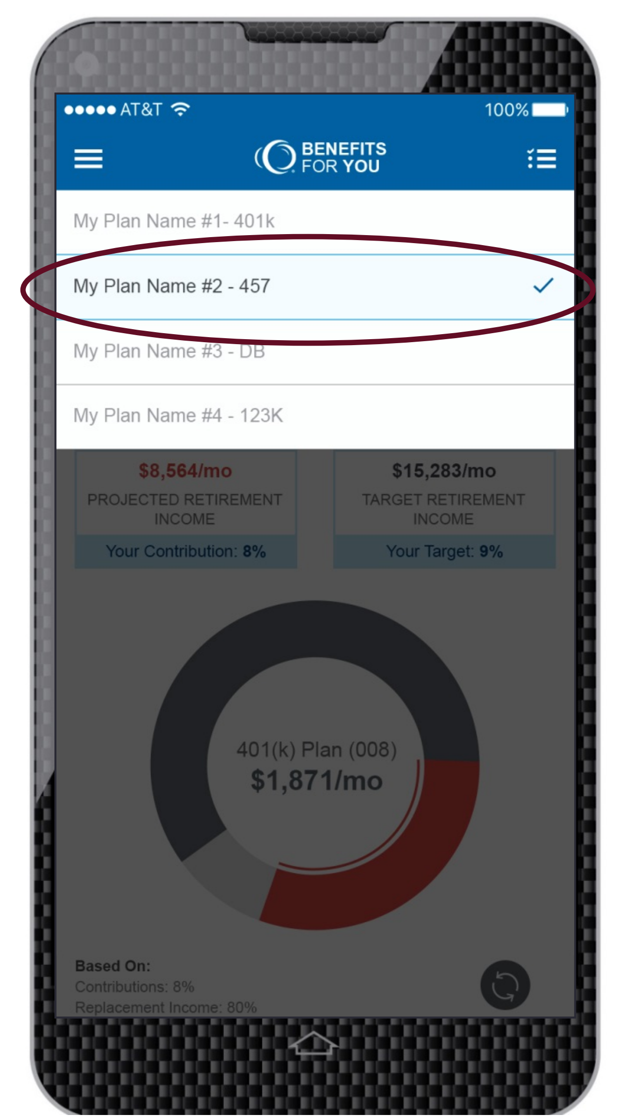
Participant Left Menu Options: View account details



Left Menu Options

- Participant views balance, return rate, notifications, transactions and more

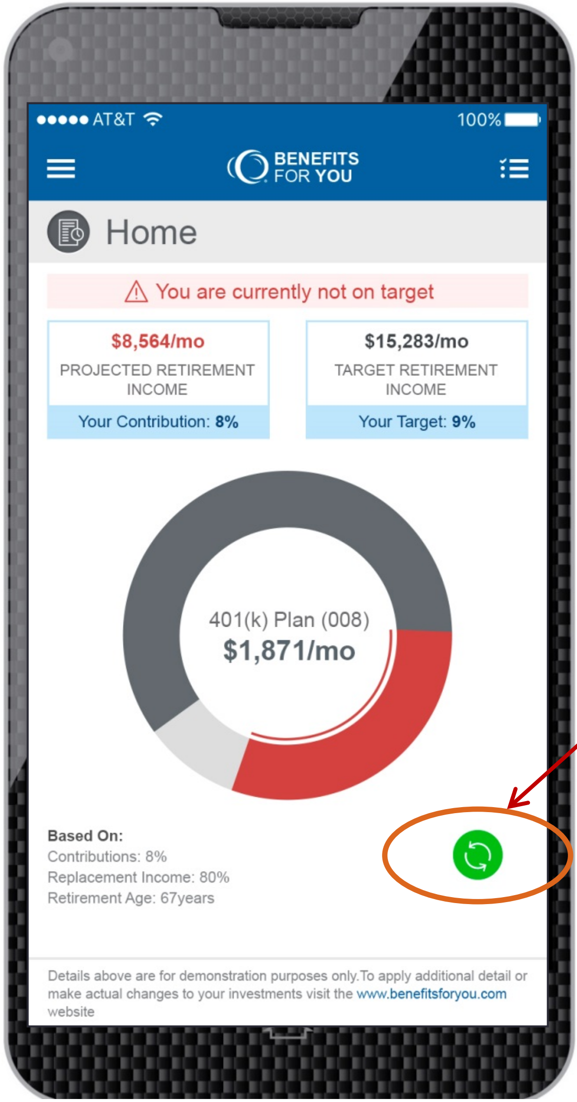
Participant Right Menu: Plan Details



Right Menu Options:

- Participant sees all plans listed under their Social Security Number
- Choose the plan to see details

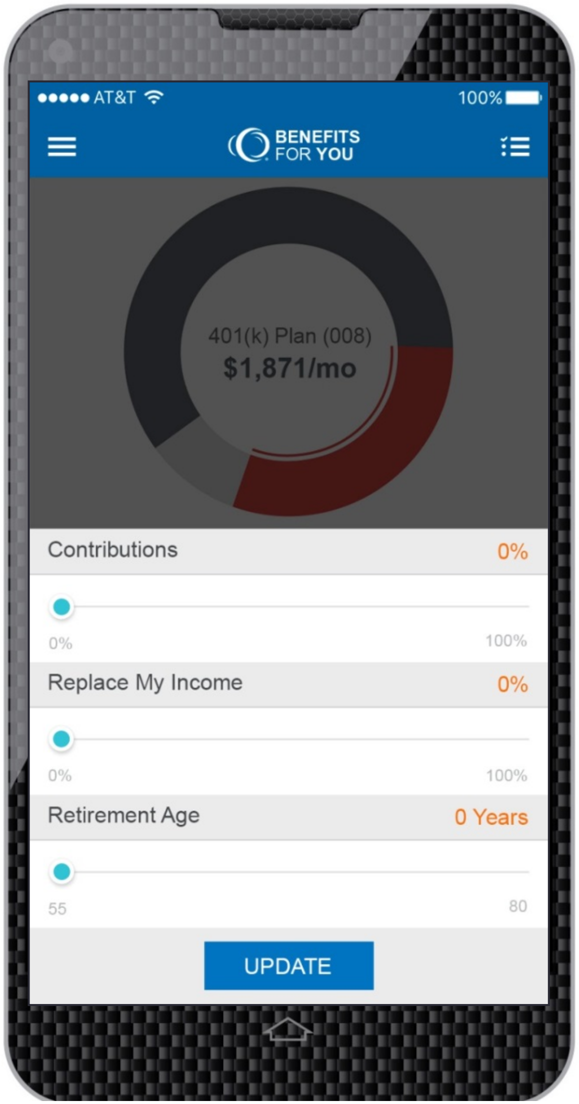
Home Page: RetireOnTarget Screen



Participant Chooses Action:

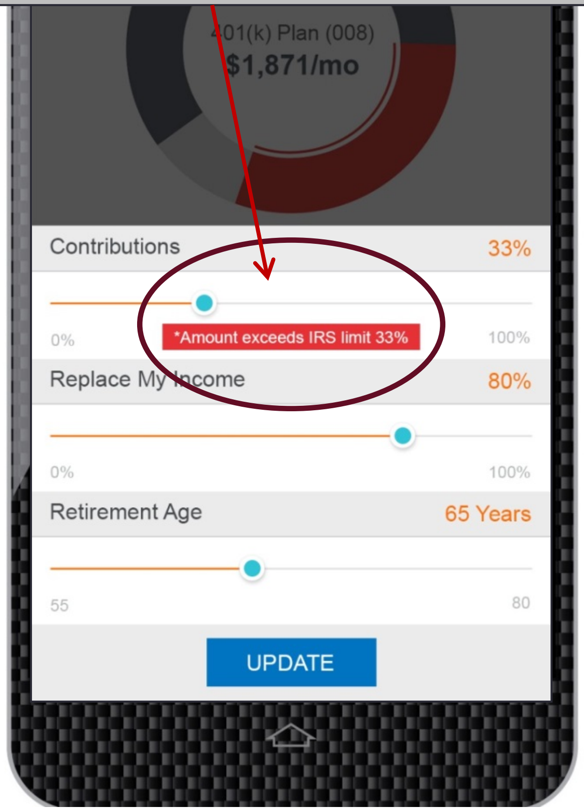
- Changes will be made and simulated in the app
- Can click the green button to see how to get on target

RetireOnTarget Home Page: Options

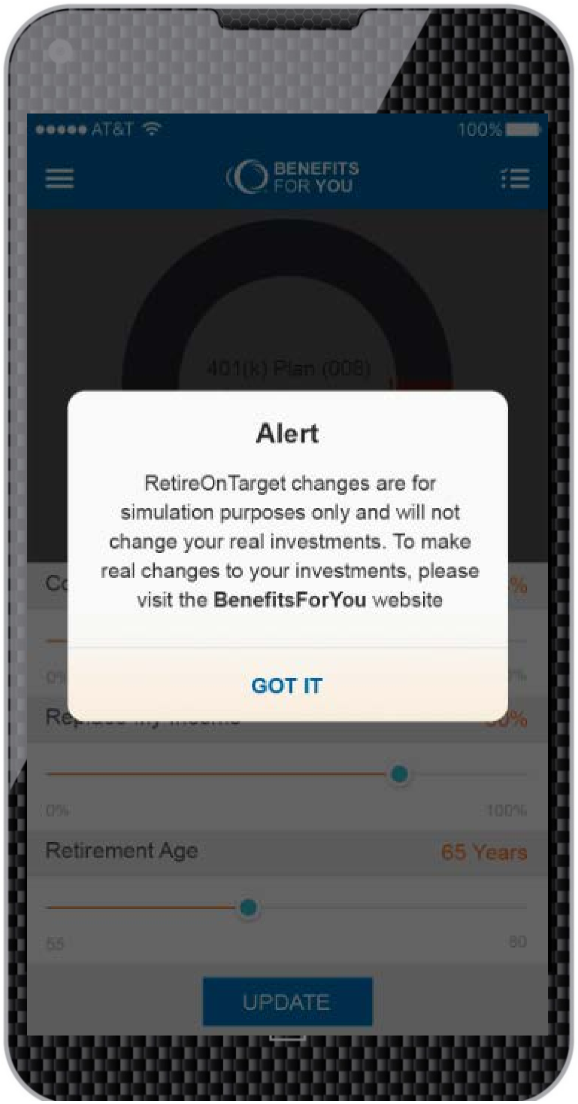


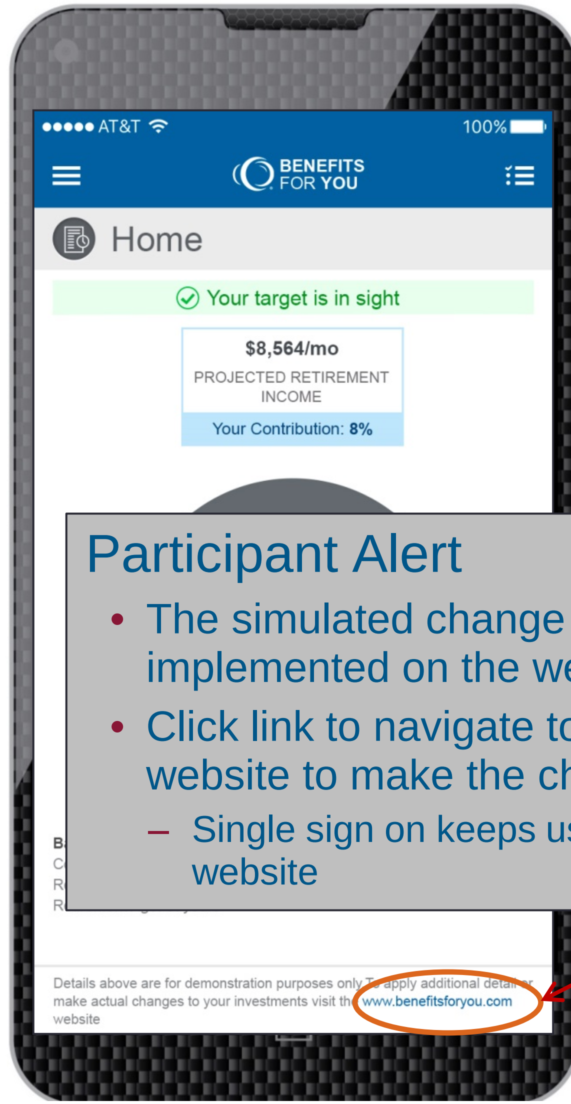
Participant Changes:

- Can change contributions, the amount of income to replace, retirement age
- When a contribution exceeds IRS limits, a message will inform the participant



Alert: Simulated Change Can Be Implemented



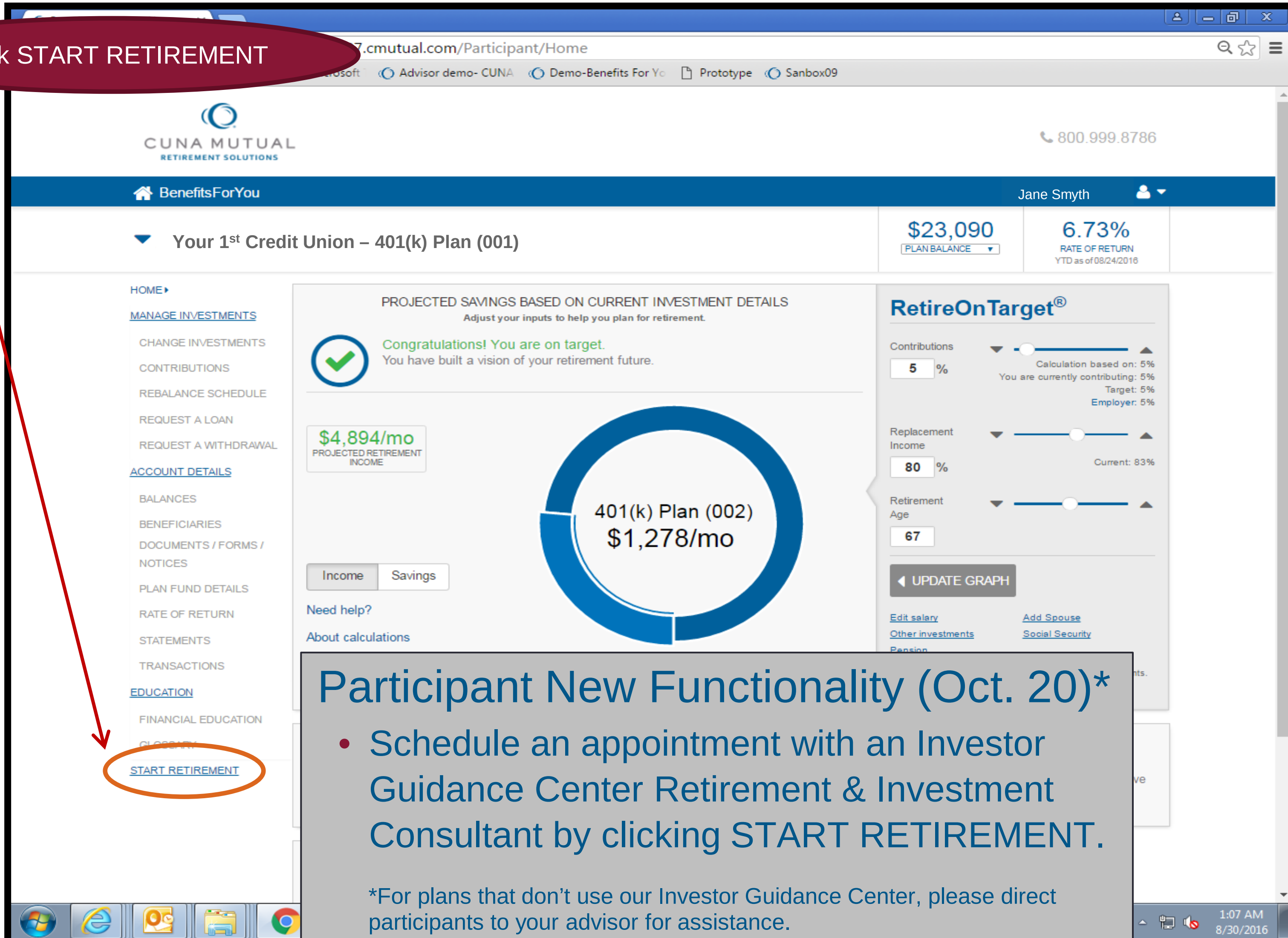


Participant Alert

- The simulated change in app can be implemented on the website if they wish
- Click link to navigate to the responsive website to make the change
  - Single sign on keeps user logged in on live website

START RETIREMENT: schedule an appointment tool

Click START RETIREMENT



Participant New Functionality (Oct. 20)*

- Schedule an appointment with an Investor Guidance Center Retirement & Investment Consultant by clicking START RETIREMENT.

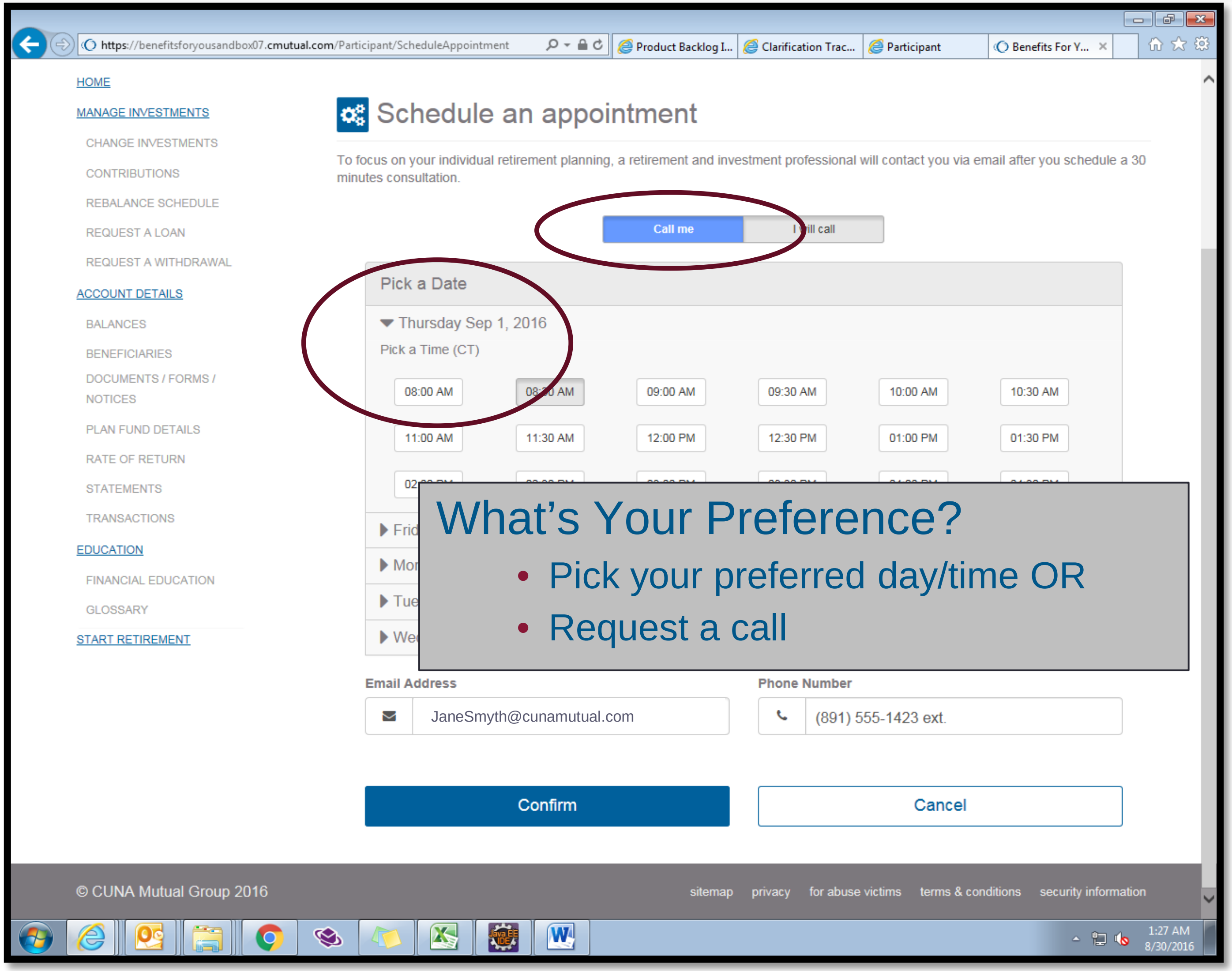
*For plans that don't use our Investor Guidance Center, please direct participants to your advisor for assistance.

Schedule an appointment: Investor Guidance Center

Scheduling and Resources

- Make Appointment Now button
- Income planning and advice
- Education and guidance materials

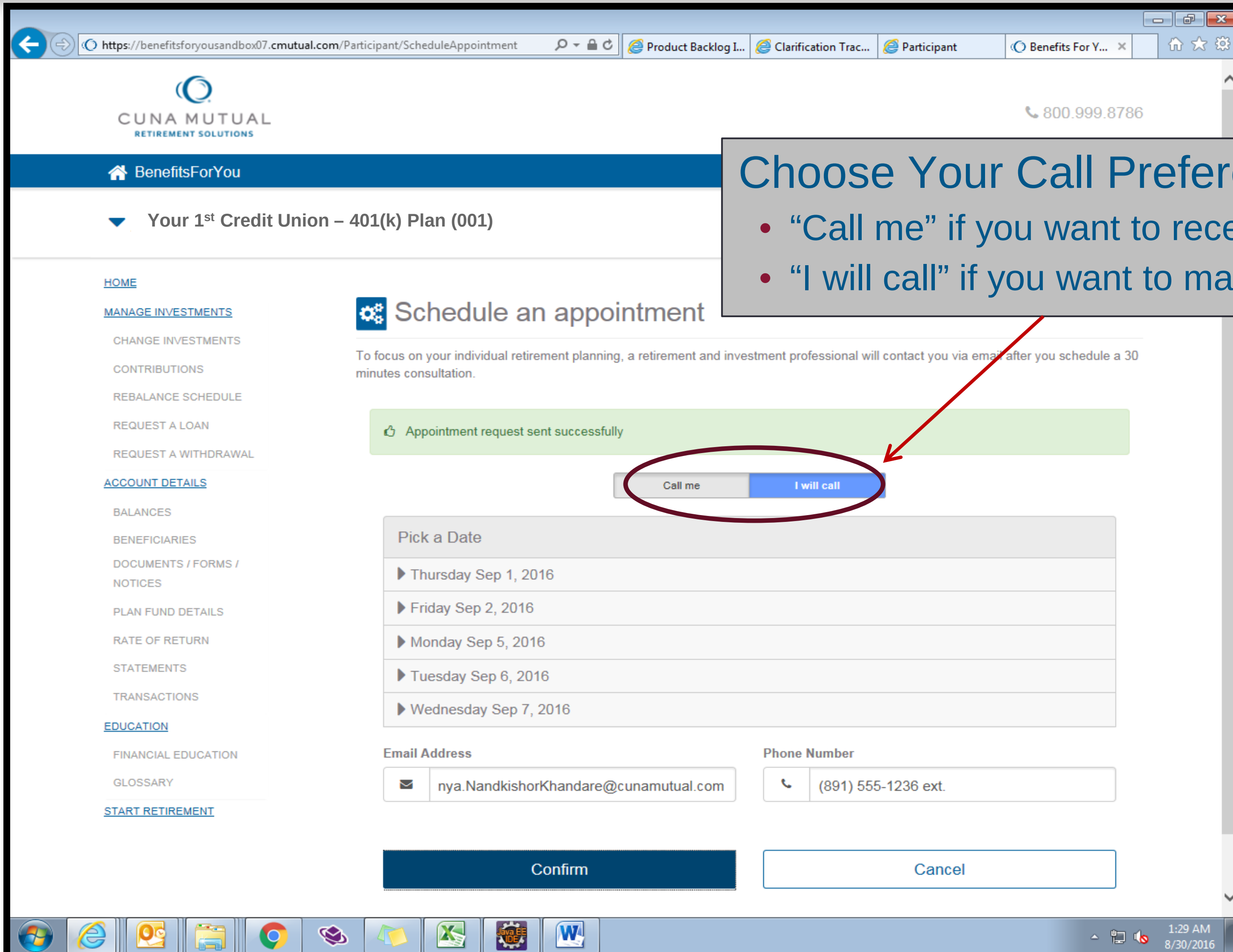
Schedule an appointment: Investor Guidance Center



What's Your Preference?

- Pick your preferred day/time OR
- Request a call

Schedule an appointment: Investor Guidance Center



Choose Your Call Preference

- "Call me" if you want to receive a call
- "I will call" if you want to make the call

START RETIREMENT: for plans that have an advisor

- HOME
- MANAGE INVESTMENTS
  - FUND TRANSFERS
  - INVESTMENT ELECTIONS
  - REBALANCE SCHEDULE
  - REQUEST A LOAN
- ACCOUNT DETAILS
  - BALANCES
  - DOCUMENTS / FORMS / NOTICES
  - PLAN FUND DETAILS
  - RATE OF RETURN
  - STATEMENTS
  - TRANSACTIONS
- EDUCATION
  - FINANCIAL EDUCATION
  - GLOSSARY
- START RETIREMENT ▸

Start Retirement Income Planning

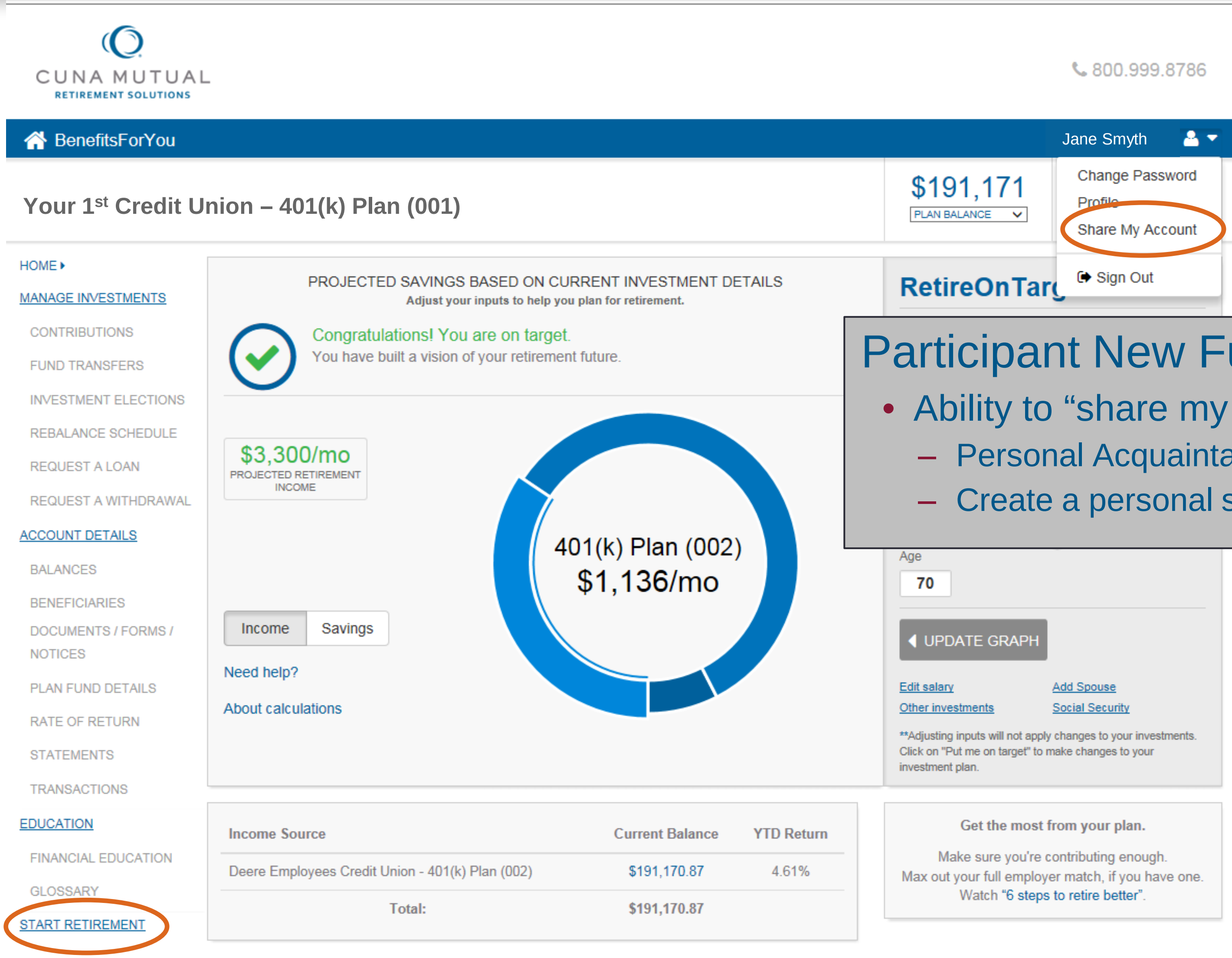
For Programs with an Advisor*

- Use tools to manage your money
- Call your advisor for personal attention

*For plans that don’t use the Investor Guidance Center, please see your advisor for assistance.

Managing your Money	Retirement Lifestyle	Retirement Courses	Tools and Resources
Learn More	Learn More	Learn More	Learn More

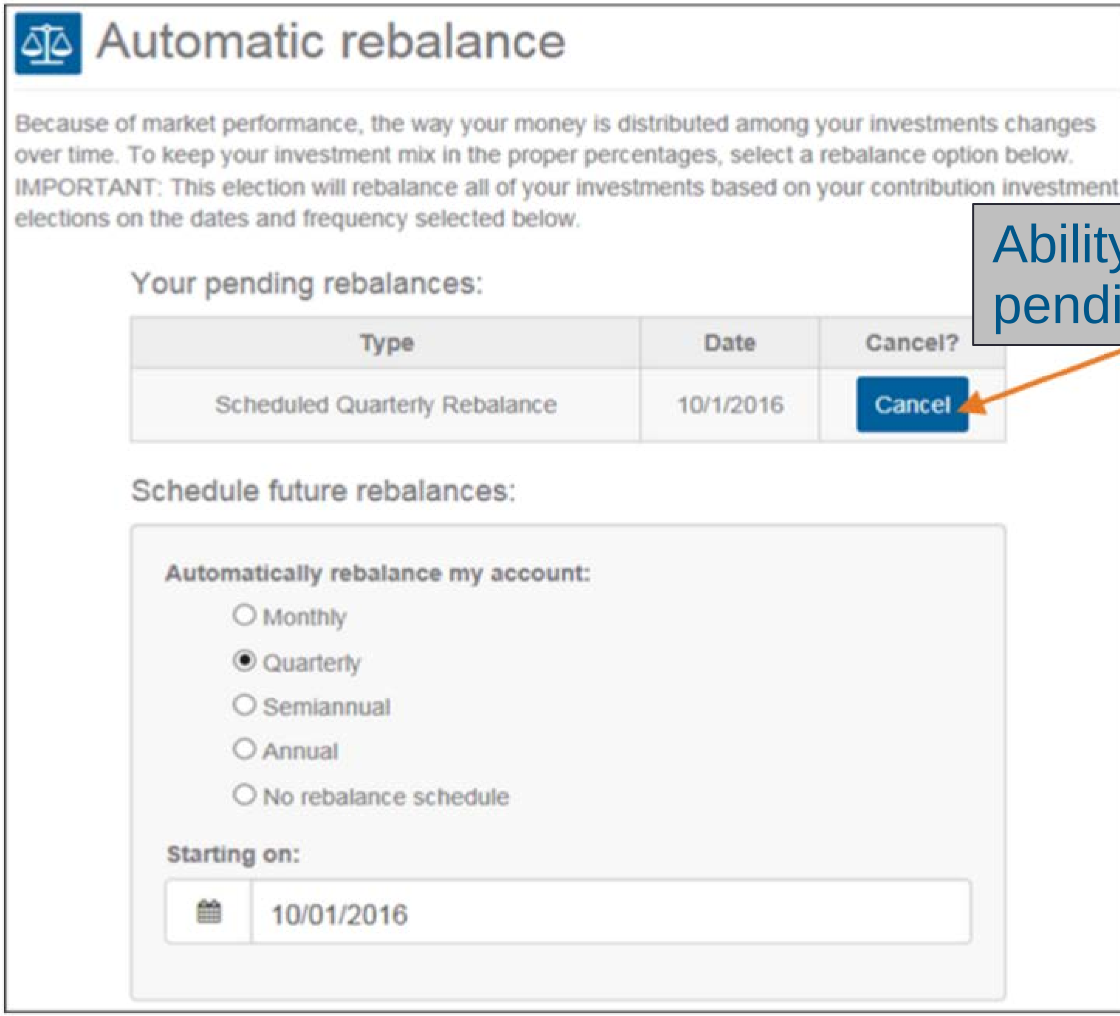
ShareMyAccount: new participant functionality



Participant New Functionality

- Ability to "share my account" with:
  - Personal Acquaintance
  - Create a personal secondary account

Cancel a pending rebalance



Ability to cancel a pending transaction

Disclosure

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