Go-Retire On-Line Retirement Plan Participant Account Access

Go-Retire includes several features that help you discover and maximize the value of your retirement plan. Follow the directions on the right to access your account or, if available, enroll in your employer sponsored retirement plan.

1. Navigate to www.go-retire.com
2. Choose Participant from the Login As panel.
3. Enter your User ID and Password.

Account Info

Quarterly Statements
The most recent available quarterly statements.

Custom Statements
Generate a statement for a custom time period.

Account Summary
View your current account by fund or source, including share prices, election percentages and total values.

Trade History*
View account activity including contributions, fees, distributions, or transfers.

Rate of Return
Shows what the rate of return is for a fund(s) for a specified period of time.

Current Loans*
Shows any current outstanding loans.

Transactions

Deferral Change*
View or change the contributions that come from your pay.

Investment Elections
View or change the way your future contributions are invested.

Fund To Fund Transfers
Transfer money between available investment options.

Rebalance*
Realign your account to your investment elections.

Loans*
Use the Loans Wizard to model or request a loan.

Distributions*
Confirm availability and request a distribution from your account.

Web Transaction Status
View completed and pending transactions

SDBA*
A Self-Directed Brokerage Account ('SDBA') allows you access to a wide array of investment choices beyond the core investment options in your retirement plan.

Resource Center

Fund Central
View information for your plan's available investment options, including performance and fees.

My Retirement Goal
Tool to help you figure out how much to save to try to meet your retirement goals

Financial Wellness
Access additional financial tools and links to help you determine your tolerance for risk and evaluate your financial health.

Education Center
A collection of resources to help you better understand your retirement plan and the vital role it plays in helping you achieve your retirement goals.

Plan Contacts
Find contact information for your plan sponsor and the participant service center.

SmartPlan
This is an Interactive Video-Based Retirement Planning Tool

Personal

Account Maintenance
Update your contact information, sign up for monthly statements, and change your security settings.

Designate Beneficiaries*
Allows you to designate your beneficiaries.

Financial Wellness

If you need a replacement Password…

In the event that your Password is lost or forgotten, you may use the Password reset tool on the web or request a replacement Password by calling the Participant Service Center(PSC) at 1-800-716-3742, Monday through Friday, 6:00AM to 8:00PM EST, and pressing *0 to speak to a PSC Representative. A password will be generated and sent to the e-mail address you entered into the system when you set up your account.

*** Some features are optional and may not be available for your plan.**

Voice Response Retirement Plan Participant Account Access via Telephone

1-800-716-3742

TThe Toll-Free Voice Response System can be accessed as follows:

1. Dial 1-800-716-3742.
2. Press 1 for English or 2 for Spanish.
3. Enter your Social Security Number and your Personal Identification Number (PIN).

Once you enter the system, the steps you follow depend on the type of information or service needed. Please note that the numbers preceding the function descriptions denote the corresponding numbers on your telephone keypad that you would press to select that function. The functions available may include:

Account Balance Information – Press 1

- 1 - Total balances
  - 1 - Total balance by contribution source
  - 2 - Total balance for each fund
  - 4 - Total account balance
- 2 - Total vested balance
- 3 - Project future balances

Administer Your Account – Press 2

- 1 - To administer your contribution percentage
- 2 - To administer fund election percentages
- 3 - To administer your Personal Identification number
- 4 - To administer your dividend handling preference

Transfer Current Account Balances – Press 3

Loan Information – Press 4

- 1 - Information on an existing loan
  - 1 - Existing loan
  - 2 - Amount available
  - 3 - Model a new loan
- 2 - Hardship withdrawal infomation

Plan Specifics – Press 5

- 4 - Hear fund price information (net asset value)

Review Changes – Press 9

- 1 - Review pending request(s)
- 2 - Cancel all update requests

Help – Press *H

Main Menu – Press *M

A confirmation of any VRS initiated transaction request will be mailed to you within one business day. Please allow additional time for U.S. Postal delivery.

If you need a replacement PIN…

In the event that your PIN is lost or forgotten, you may request a replacement PIN by calling the VRS at 1-800-716-3742, Monday through Friday, 8:00AM to 8:00PM Eastern Time, and pressing 0 for assistance from a Participant Service Center Representative. Please be aware that a representative will need to verify your identification before a new PIN is provided.