

How to Enroll

STEP 1 – Log in to Retirement Manager ([https://www.myretirementmanager.com/.](https://www.myretirementmanager.com/))

First-time users will need to click *I'm a New User* to establish a password.

- o Enter your Employee Unique ID (assigned by your employer)
- o Create a new password
- o Click *Submit*
- If you are not a new user and have forgotten your password, click *I Forgot My Password* to assign a new password.

STEP 2 – After logging in, click on the *Enroll/Make Changes* tab at the top of the page.

STEP 3 – To enroll:

- Enter your e-mail address (you will need to re-enter it to verify)
- Identify the effective payroll date
- Enter either the % of your pay or the \$ amount
- Select the vendor(s)
- Click the *Submit* button

| Enter Contact information (for a confirmation email): Email Address: <input type="text"/> Re-enter Email Address: <input type="text"/> | | Email Address | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---------------|---|----------------------------------|----------------------------------|----------|---------------|-----------|--|-----------|---|--|-----|---------------------------------------|--------------------------------------|----------------------|-------------------|--|----------------------|---|----------------------|-------------------|---|----------------------|---|----------------------|---------------|--------------|--|--------------|--|-----------|---------|---------|
| • Your contribution limit for this year is \$15,500.00. | | Paycheck Date: | _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Paycheck Date: <input type="text"/> | | New Amount | _____ % per pay | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Available Retirement Contribution Types - Please select an option and enter a value for each contribution type in which you wish to participate. | | _____ \$ per pay | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table border="1"> <thead> <tr> <th colspan="2">Employee Deferral</th> <th>Undo Selection</th> </tr> <tr> <th>Option</th> <th>Current Value</th> <th>New Value</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="radio"/> Percent of Salary</td> <td>10 %</td> <td><input type="text"/> % (per pay period)</td> </tr> <tr> <td><input type="radio"/> Flat Dollar Amount</td> <td>N/A</td> <td><input type="text"/> (per pay period)</td> </tr> <tr> <td><input type="radio"/> Stop Deduction</td> <td></td> <td></td> </tr> </tbody> </table> | | Employee Deferral | | Undo Selection | Option | Current Value | New Value | <input checked="" type="radio"/> Percent of Salary | 10 % | <input type="text"/> % (per pay period) | <input type="radio"/> Flat Dollar Amount | N/A | <input type="text"/> (per pay period) | <input type="radio"/> Stop Deduction | | | <input checked="" type="checkbox"/> Stop Deduction | | | | | | | | | | | | | | | | |
| Employee Deferral | | Undo Selection | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Option | Current Value | New Value | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input checked="" type="radio"/> Percent of Salary | 10 % | <input type="text"/> % (per pay period) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="radio"/> Flat Dollar Amount | N/A | <input type="text"/> (per pay period) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="radio"/> Stop Deduction | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Percent Allocated to each Vendor - You will need to open an account with the investment vendor(s) with whom you presently have no account. | | Retirement Investment Vendor | Percent of Employee Contribution | Percent of Employer Contribution | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table border="1"> <thead> <tr> <th rowspan="2">Retirement Investment Vendor</th> <th colspan="2">Employee</th> <th colspan="2">Employer</th> </tr> <tr> <th>Current %</th> <th>New %</th> <th>Current %</th> <th>New %</th> </tr> </thead> <tbody> <tr> <td>Approved Vendor 1</td> <td>100</td> <td><input type="text"/></td> <td>100</td> <td><input type="text"/></td> </tr> <tr> <td>Approved Vendor 2</td> <td>0</td> <td><input type="text"/></td> <td>0</td> <td><input type="text"/></td> </tr> <tr> <td>Approved Vendor 3</td> <td>0</td> <td><input type="text"/></td> <td>0</td> <td><input type="text"/></td> </tr> <tr> <td>Totals</td> <td>100 %</td> <td></td> <td>100 %</td> <td></td> </tr> </tbody> </table> | | Retirement Investment Vendor | Employee | | Employer | | Current % | New % | Current % | New % | Approved Vendor 1 | 100 | <input type="text"/> | 100 | <input type="text"/> | Approved Vendor 2 | 0 | <input type="text"/> | 0 | <input type="text"/> | Approved Vendor 3 | 0 | <input type="text"/> | 0 | <input type="text"/> | Totals | 100 % | | 100 % | | Vendor #1 | _____ % | _____ % |
| Retirement Investment Vendor | Employee | | Employer | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Current % | New % | Current % | New % | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Approved Vendor 1 | 100 | <input type="text"/> | 100 | <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Approved Vendor 2 | 0 | <input type="text"/> | 0 | <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Approved Vendor 3 | 0 | <input type="text"/> | 0 | <input type="text"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Totals | 100 % | | 100 % | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | Vendor #2 | _____ % | _____ % | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | Vendor #3 | _____ % | _____ % | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="button" value="Submit"/> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |