

PLAN SPONSOR WEB GUIDE

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A. Account Access & Multi-Factor Authentication

Trust Point's online web access is a comprehensive, contemporary web solution that makes it easy to manage the retirement account online. Viewable on a desktop, tablet, or mobile phone, this responsive web account boasts user-friendly navigation and a progressive dashboard keeping users well-informed.

The online web access uses Multi-Factor Authentication (MFA) to enhance the safety and security of your account. What is MFA? It is an added a layer of security, beyond your regular password, that significantly reduces the risk of unauthorized users accessing your accounts.

To access your account online:

1. Visit <https://www.accountplanaccess.net/trustpoint/sponsor.aspx>
2. Enter your username and password. Ensure "Sponsor" is selected in the dropdown. Click "LOGIN."

New User English / Español

Username *

Password *

[Forgot User ID or Password?](#)

Sponsor

[Retirement Account FAQ](#)

Note: Both entries are case sensitive. If you fail to login three consecutive times your account could be disabled.

LOGIN

3. Multi-Factor Authentication: A One-Time PIN will be sent to you via the cell phone number or email associated with your account. You will have five minutes to enter the PIN and click, "Next."

One-Time PIN Required

A one-time PIN has been sent to your selected delivery method:*****@yahoo.com. Retrieve your pin and enter it below.

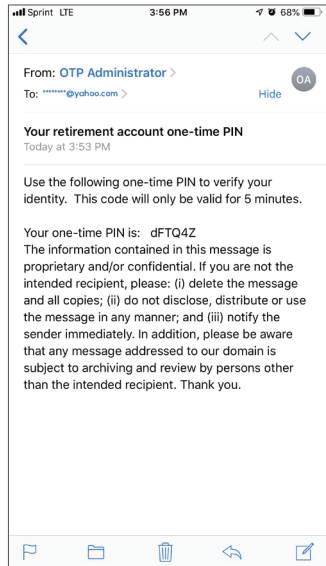
One Time Pin:
Resend PIN (Link will be enabled in 48 seconds)

Device Registration: Do not remember this device.
 Remember this device. This is my computer or mobile that I use regularly.

Note: In order to receive your One-Time PIN, it is important to update your account with any changes in your mobile phone number or e-mail. Phone number should be capable of receiving texts. Messages & Data rates may apply.

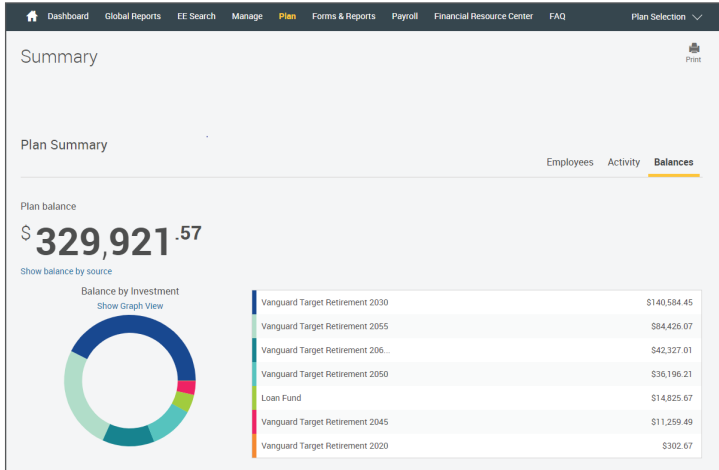
Locked Out?

Please reach out to your Relationship Manager if you are locked out of your account or if you forgot your password.



B. Dashboard

The plan sponsor experience is enhanced through an informative dashboard that allows for a quick summary of data about the plan and interactive, one-click actions to drill deeper into the detail.



Investment Balances

View balance by account

Investment	Fund ID	Balance	Participants
Vanguard Target Retirement 2020	VTWNX	\$302.67	1
Vanguard Target Retirement 2030	VTHR	\$140,584.45	2
Vanguard Target Retirement 2045	VTIVX	\$11,259.49	1
Vanguard Target Retirement 2050	VFIFX	\$36,196.21	2
Vanguard Target Retirement 2055	VFFVX	\$84,426.07	3
Vanguard Target Retirement 2060 Inv	VITTSX	\$42,327.01	2
Loan Fund	LOAN	\$14,825.67	3

Payroll Contributions

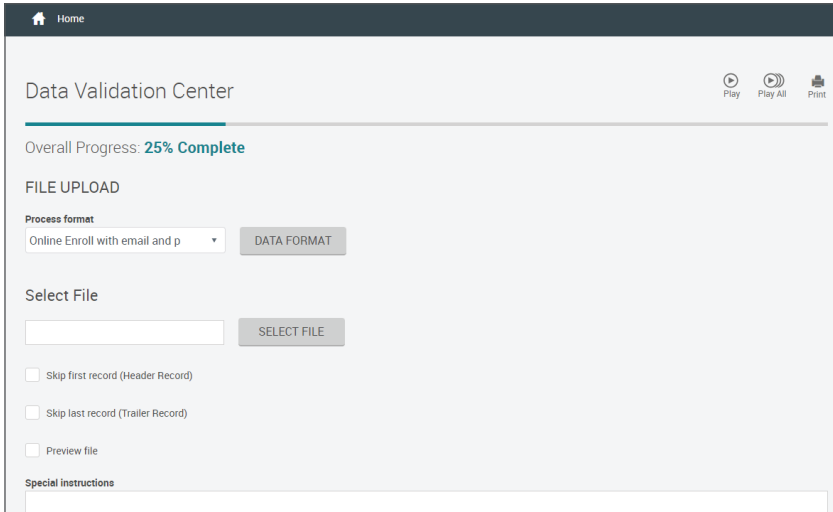
Next scheduled payroll contribution 02/16/2024.

Date	Division	Amount	Status
02/09/2024	Default	\$732.67	Settled
02/02/2024	Default	\$733.25	Settled
01/26/2024	Default	\$734.96	Settled

C. Uploading New Employee Demographics

If your plan is set up with online and/or automatic-enrollment, you will need to upload (or manually submit) employee demographic data for all new employees. It is best practice to do so as soon as the employee is hired since ALL employees who receive compensation during the year will need to be accounted for on the plan's year-end compliance testing and tax filing.

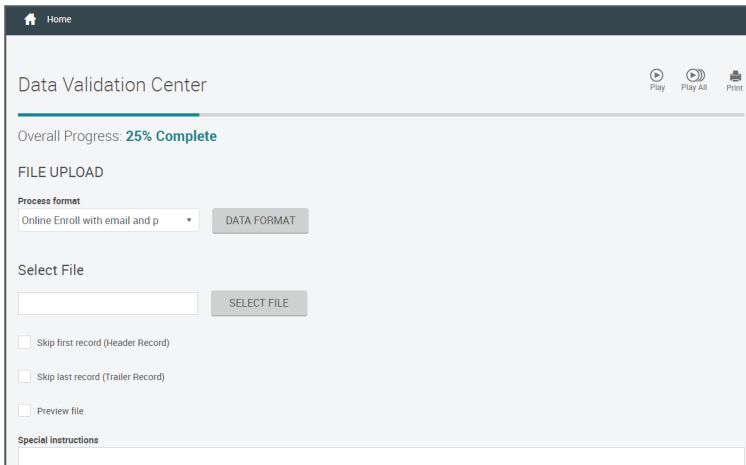
- From the Dashboard, select “Payroll” and “Data Validation Center.”
- To upload demographic information, select “Demographic” from the drop-down menu.
- Select “Upload a file containing the demographic data” if you have a file that contains the employee data. For manual submission of employee data, select “Manually enter new employee information” and proceed to the instructions for Manual Submission on page 8 of this Web Guide.
- Click “Next”.



The screenshot displays the 'Data Validation Center' interface. At the top left, there is a 'Home' link with a house icon. The main title 'Data Validation Center' is centered, with 'Play', 'Play All', and 'Print' icons on the right. Below the title, it shows 'Overall Progress: 25% Complete'. The 'FILE UPLOAD' section includes a 'Process format' dropdown menu set to 'Online Enroll with email and p' and a 'DATA FORMAT' button. The 'Select File' section features a file input field and a 'SELECT FILE' button. There are three checkboxes: 'Skip first record (Header Record)', 'Skip last record (Trailer Record)', and 'Preview file'. At the bottom, there is a 'Special instructions' section with a text area.

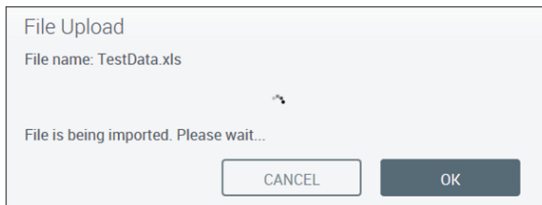
File Upload:

- Select “Add Participants” or “Online Enroll with email and p” from the drop-down menu. (To review the layout for the demographic file, click on “Data Format.” The order of information required in the file can be found here. Each row of information corresponds with a column in the Excel/CSV file.)
- Click the “Select File” button and find the Excel/CSV file with your demographic information.
- If your Excel/CSV file contains a header row at the top and/or a totals row at the bottom, please be sure to check the appropriate boxes to skip the first and/or last record.
- Click “Next.”



The screenshot shows the 'Data Validation Center' interface. At the top, there is a 'Home' button and navigation icons for 'Play', 'Play All', and 'Print'. Below this, a progress bar indicates 'Overall Progress: 25% Complete'. The main section is titled 'FILE UPLOAD'. Under 'Process format', there is a dropdown menu set to 'Online Enroll with email and p' and a 'DATA FORMAT' button. The 'Select File' section includes a file input field and a 'SELECT FILE' button. Below the input field are three checkboxes: 'Skip first record (Header Record)', 'Skip last record (Trailer Record)', and 'Preview file'. At the bottom, there is a 'Special instructions' section with a text area.

You will see a pop-up message while the file is being uploaded.



The screenshot shows a 'File Upload' pop-up message. It displays 'File name: TestData.xls' and a progress indicator. Below the progress indicator, it says 'File is being imported. Please wait...'. At the bottom, there are two buttons: 'CANCEL' and 'OK'.

Totals/File Import Results:

- This page reflects a summary of the uploaded file.
- To print the report for your records select “Print Report” button.
- To process another file, select the “Process another file” button to be returned to the Data Validation Center.
- If there are no other files to submit and all information is correct on the screen, select “Submit for final processing” and click “Complete.”

Data Validation Center Play Play All Print

Overall Progress: 75% Complete

Totals

File Import Results

[PRINT REPORT](#)

Import Census Report

Job Status:	Successful
Plan ID:	DEMO
Plan name:	DEMO PLAN
DER name:	Add Participants
Transfer file:	\\rfsdpvqg2\nc1100\Data\New\DEMO_3210766_ult
Mode:	Preview
Transfer processed on:	04/08/2016
Execution Errors:	None
Special Instructions:	
There were no notes assigned to this job.	
Existing employees updated:	0
New employees added:	0
Total employees transferred:	0
Total employees NOT transferred:	0
Client import errors:	0
Oracle server import errors:	0
Validation Rules:	
General Validation Messages:	

File Submission

Submit for final processing

Process another file

[START OVER](#) [BACK](#) [COMPLETE](#)

Confirm/Import:

- This page provides a confirmation number for your upload, along with the date and time of completion. To print this page for your records select “Print.”
- The participant accounts are now set-up and those individuals may log into the website to enroll and/or change their elections.

Data Validation Center Play Play All Print

Overall Progress: **100% Complete**

Confirm / Import

✔ Your request has been submitted for processing. Your request ID is **4206778**, Date/Time is Feb 26, 2024 at 10:20:43 am

START OVER EXIT

If you have no further payroll processing to complete, select “Exit” to return to the Dashboard. If you have more payroll processing to complete, select “Start Over” to return to the Data Validation Center and begin the payroll upload.

Manual Submission:

You may choose to manually enter employee information.

- From the dashboard, select “Payroll” and “Data Validation Center.”
- Select “Demographic” from the drop-down menu.
- Select “Manually enter new employee information.”
- The drop-down menu should have “Add Participants” or “Online Enroll with email and p” selected.
- Click “Next.”

Data Validation Center

Overall Progress: **0% Complete**

Edit Data

Save Undo Delete Refresh Add All **Add New** Add Existing Validate Records Print Errors Print Grid Download

0, ,

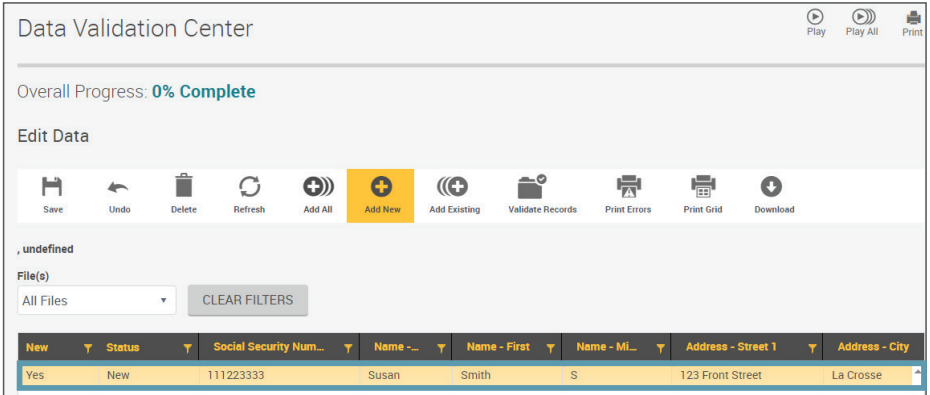
File(s)
All Files CLEAR FILTERS

New	Status	Social Security Num...	Name --	Name - First	Name - Mi...	Address - Street 1	Address - City
Yes	New						

Page 1 of 1 20 items per page

Click “Add New” from menu bar.

Enter the data in the fields as indicated by clicking in the box below the column header. **You will need to tab through and enter information in all fields.** Once all the data has been entered, review the data, and click “Next.”



The screenshot shows the 'Data Validation Center' interface. At the top right, there are icons for 'Play', 'Play All', and 'Print'. Below this, the 'Overall Progress' is shown as '0% Complete'. The 'Edit Data' section contains a toolbar with icons for 'Save', 'Undo', 'Delete', 'Refresh', 'Add All', 'Add New' (highlighted in yellow), 'Add Existing', 'Validate Records', 'Print Errors', 'Print Grid', and 'Download'. Below the toolbar, there is a filter section with a dropdown menu set to 'All Files' and a 'CLEAR FILTERS' button. At the bottom, a table displays data with columns: 'New', 'Status', 'Social Security Num...', 'Name --', 'Name - First', 'Name - MI_', 'Address - Street 1', and 'Address - City'. The first row of data is highlighted in yellow.

New	Status	Social Security Num...	Name --	Name - First	Name - MI_	Address - Street 1	Address - City
Yes	New	111223333	Susan	Smith	S	123 Front Street	La Crosse

If any of the data needs to be edited, click the field and edit the data. Review the information and click “Next” to be taken to the totals page.

NOTE: The totals page will give you the overall progress and it is normal to see the warning “SS NUMBER DOES NOT EXIST IN DATA BASE” on this page when you are adding a new employee to the system. If you get this warning, it is okay to proceed.

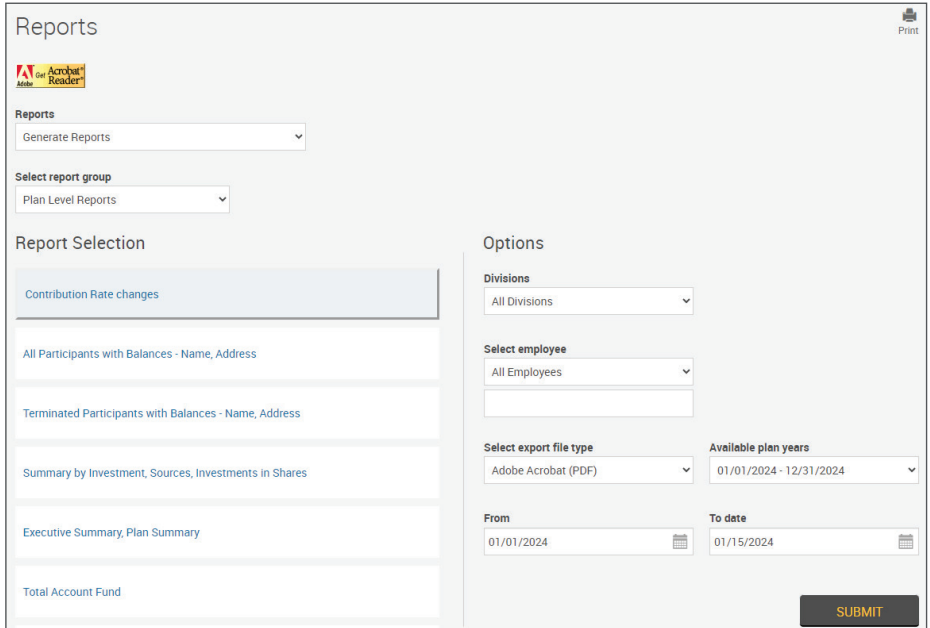
Click “Complete” and you will see the final confirmation screen.



The screenshot shows the 'Data Validation Center' interface. At the top right, there are icons for 'Play', 'Play All', and 'Print'. Below this, the 'Overall Progress' is shown as '100% Complete'. The 'Confirm / Import' section contains a green message: 'Your request has been submitted for processing. Your request ID is 4213977, Date/Time is Mar 21, 2024 at 11:23:02 am'. At the bottom, there are two buttons: 'START OVER' and 'EXIT'.

D. Contribution Rate Change Report

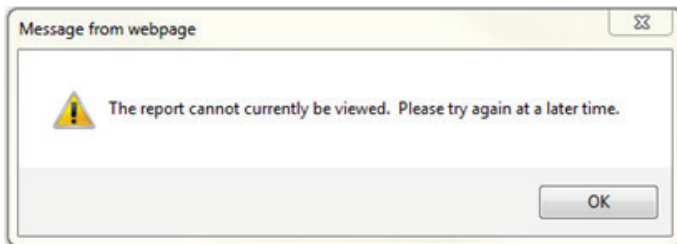
If your plan is set up with online enrollment, participants will change their deferral rates online. You will need to review the contribution rate change report before running each payroll to be aware of any requested changes that have been made.



The screenshot shows a web interface for generating reports. At the top left, there is a 'Reports' header and a 'Print' icon. Below the header, there is an 'Adobe Acrobat Reader' logo. The main content area is divided into two columns. The left column, titled 'Report Selection', contains a list of report options: 'Contribution Rate changes' (highlighted in blue), 'All Participants with Balances - Name, Address', 'Terminated Participants with Balances - Name, Address', 'Summary by Investment, Sources, Investments in Shares', 'Executive Summary, Plan Summary', and 'Total Account Fund'. The right column, titled 'Options', contains several dropdown menus and date pickers: 'Divisions' (set to 'All Divisions'), 'Select employee' (set to 'All Employees'), 'Select export file type' (set to 'Adobe Acrobat (PDF)'), 'Available plan years' (set to '01/01/2024 - 12/31/2024'), 'From' (set to '01/01/2024'), and 'To date' (set to '01/15/2024'). A 'SUBMIT' button is located at the bottom right of the 'Options' section.

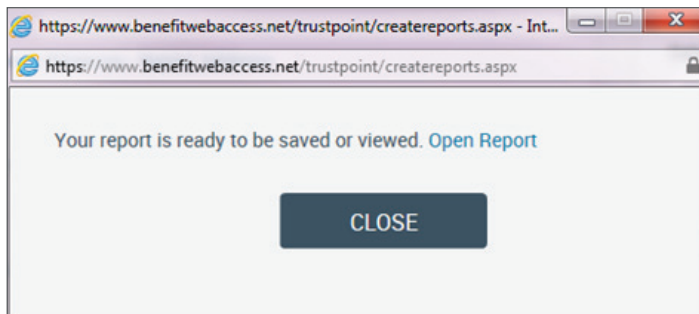
- From the top menu, select “Forms & Reports”
- From the list of reports, select “Contribution Rate Change.”
- On the right, select from the options available from the drop-down menu and enter the date range.
- Click “Submit.”

If there are no contribution changes for this period you will get the pop-up message below:



If there are contribution rate changes:

- The following pop-up message will appear when the contribution rate change report is ready.
- Click “Open Report” to view it.

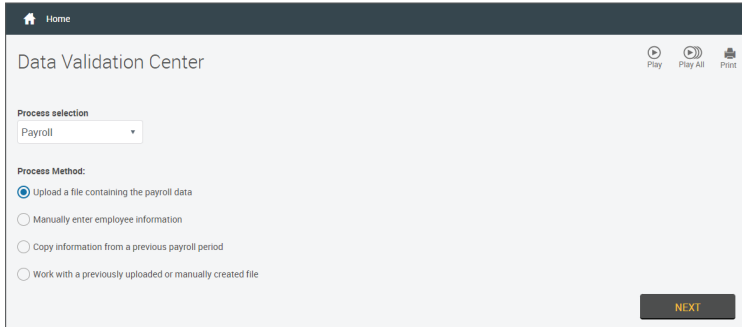


Your contribution rate change report will open in a separate window. On the report there will be a list of participants who have requested a change or enrolled online. It will also include the new election percentage for pre-tax and/ or roth deferrals and the date on which the request was entered online.

NOTE: These changes must be entered, or communicated to the payroll provider, in advance of processing payroll.

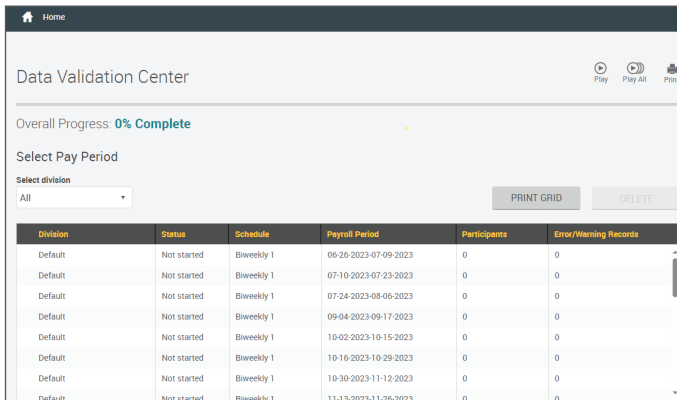
E. Contribution Processing

- To upload contributions, select “Payroll” from the top menu and then “Data Validation Center.”
- Select “Payroll” from the drop-down menu.
- Select “Upload a file containing the payroll data” and “Next.”



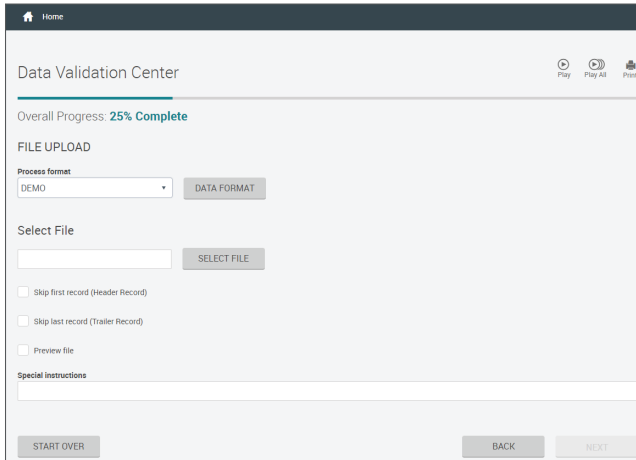
Select Pay Period:

- From the list, select the payroll period applicable. The payroll period END DATE should correspond with the actual pay date for which you are uploading the contribution.
- Click “Next.”



File Upload:

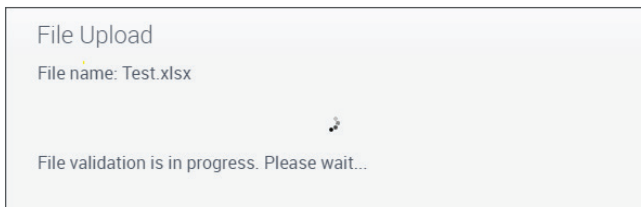
- Click “Select File” and find the Excel/CSV file with your contribution information.
- If your Excel/CSV file contains a header row at the top and/or a totals row at the bottom, please be sure to check the appropriate boxes to skip the first and/or last record.
- Click “Next.”



The screenshot shows a web application interface titled "Data Validation Center". At the top, there is a "Home" button and three utility icons: "Play", "Play All", and "Print". Below the title, it indicates "Overall Progress: 25% Complete". The main section is titled "FILE UPLOAD" and contains the following elements:

- Process format:** A dropdown menu set to "DEMO" and a "DATA FORMAT" button.
- Select File:** A text input field and a "SELECT FILE" button.
- Options:** Three checkboxes: "Skip first record (Header Record)", "Skip last record (Trailer Record)", and "Preview file".
- Special Instructions:** A text area for additional notes.
- Navigation:** "START OVER", "BACK", and "NEXT" buttons at the bottom.

This pop-up message will appear while your file is being uploaded. Once the file upload is complete, you will automatically be taken to the next step.



The screenshot shows a modal dialog box with the following content:

- Title:** File Upload
- Text:** File name: Test.xlsx
- Progress:** A circular progress indicator with a small portion filled.
- Text:** File validation is in progress. Please wait...

Total/Funding:

- Verify the subtotals for each money source and the total payroll deposit amount which is the total of all money sources.
- Select the “Submit for Final Processing” button.
- Click “Complete” to submit the contribution to Trust Point.

Home

Data Validation Center

Overall Progress: **75% Complete**

Totals / Funding

Payroll Totals

Submit for final processing PRINT GRID

Division	Participants	New Participants	Total Payroll Deposit	Current Deferral \$	Employer Match	Safe
Default	1	0	1200	400	400	400
Totals	1	0	1200	400	400	400

Process another file

START OVER BACK COMPLETE

Totals Verification

I certify that I have reviewed the totals presented and that the results of the import are correct and approved for final import.

CANCEL CONTINUE

Confirm/Import:

- Once the upload is complete, you will get a confirmation screen to print. **Please make sure to print and save a copy for your records.**
- Select “Exit Validation Center” to return to the dashboard.

Error in your file:

- If you find an error in the file that you've uploaded or your payroll totals are not correct, click "Start Over." This will bring you back to the first screen of the data validation center.
- From here, select the payroll period you would like to edit.
- Click the "Delete" button in the upper right.
- In the pop-up box, check all boxes to delete "All records for the payroll period" and click "Continue." This will remove any files that were previously uploaded for that payroll period and allow you to upload a corrected file.

The screenshot shows the 'Data Validation Center' interface. At the top, there's a 'Home' button and a 'Data Validation Center' title. Below that, it says 'Overall Progress: 0% Complete'. There's a 'Select Pay Period' section with a 'Select division' dropdown set to 'All'. A table lists payroll periods with columns for 'Division', 'Status', 'Payroll Period', and 'Error/Warning Records'. A 'DELETE' button is circled in blue in the top right. A 'Delete Files' dialog box is open in the center, showing a table with 'Delete' and 'File Name' columns. Two rows are checked: 'Manual Records' and 'All records for the payroll period'. The dialog has 'CANCEL' and 'CONTINUE' buttons.

Division	Status	Payroll Period	Error/Warning Records
Default	incomplete		0
Default	Not started		0
Default	Not started		0
Default	Not started		0
Default	Not started		0
Default	Not started		0
Default	Not started	Biweekly 1 10-16-2023-10-29-2023	0
Default	Not started	Biweekly 1 10-30-2023-11-12-2023	0
Default	Not started	Biweekly 1 11-13-2023-11-26-2023	0

Delete	File Name
<input checked="" type="checkbox"/>	Manual Records
<input checked="" type="checkbox"/>	All records for the payroll period

F. Processing Participant Terminations

Entering Employee Terminations:

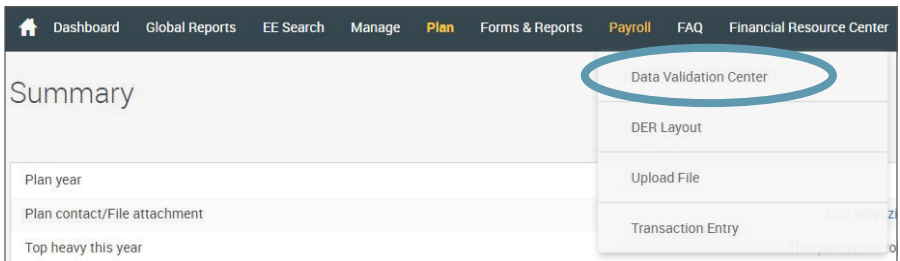
It is important that you promptly enter employee terminations into the system. Trust Point will not send out a distribution application to anyone who is terminated without this additional verification on the system, so it is important that you incorporate the online participant termination process into your general employee termination procedures.

NOTE: You should only submit a termination for employees who have fully left employment. Employees who are switching between divisions should remain active in our system.

To terminate a participant through the portal:

From the Dashboard, hover over “Payroll” and then click “Data Validation Center.”

From there select “Demographic” from the drop-down menu under “Process selection.”



At this point, you have two options: upload an excel file with multiple terminations or add terminations manually. Here are the main differences between the two:

- **File Upload:** Requires an excel document to be uploaded with specified fields (see pages 17-18). This option is best used for a large number of terminations at once.

- **Manual Entry:** With a simple search you can find specific individuals that you need to terminate. **You will need to tab through and enter information in all fields.** This process is best used if terminating a single individual or a small group of individuals.

Uploading a Termination File:

All file uploads will need to follow the format listed below in excel.

Column A: Social Security Number (can include dashes or no dashes)

Column B: Last Name

Column C: First Name

Column D: Termination Date - (mm/dd/yyyy)

Column E: Due to Death (Y/N) - (“N” for most terminations; “Y” if the participant was terminated due to death)

Column F: Address 1

Column G: Address 2

Column H: City

Column I: State

Column J: Zip

Column K: Cell Phone

Column L: Personal Email Address - (Do not provide a work email address; it is okay to leave blank if you have no personal email.)

Home

Data Validation Center

Process selection

Demographic

Process Method:

Upload a file containing the demographic data

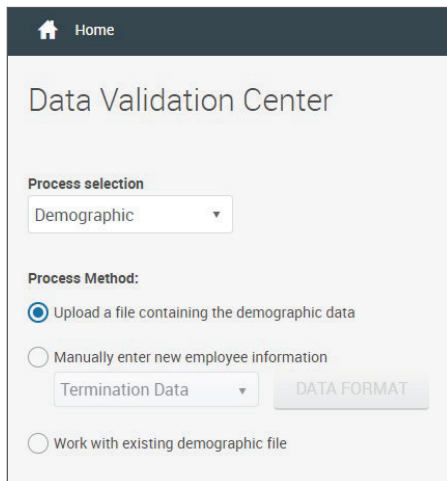
Manually enter new employee information

Termination Data DATA FORMAT

Work with existing demographic file

Column M: Years of Service - (Include the total number of years from original hire date in which the participant worked at least 1,000 hours, including the current year.)

Column N: Today's Date - (mm/dd/yyyy)



Home

Data Validation Center

Process selection

Demographic

Process Method:

Upload a file containing the demographic data

Manually enter new employee information

Termination Data DATA FORMAT

Work with existing demographic file

Make sure to check your plan document to determine if the years of service apply to a calendar year or an anniversary year. **A majority of plans will report based on total calendar years worked with 1,000 hours.**

Select the “Upload a file...” option and click “Next.”

Make sure that the process format selection reads “Termination Data” and select your termination file. Click on the “Skip first record” if your columns have labels and the first row starts with a label instead of the terminated employee. If your file does not have a header row and instead starts with the name of your first terminated employee, leave the “Skip first record” box unchecked.

Click “Next.”

Data Validation Center Play Play All Print

Overall Progress: **25% Complete**

FILE UPLOAD

Process format
Termination Data DATA FORMAT

Select File
Sample Termination Upload.xlsx SELECT FILE

Skip first record (Header Record)
 Skip last record (Trailer Record)
 Preview file


Special instructions

START OVER BACK NEXT

You will receive the following message while the file loads:

File Upload

File name: Sample Termination Upload.xlsx



Uploading file. Please wait...

After reviewing the information on the 50% progress screen, select “Complete.”

Data Validation Center

Play Play All Print

Overall Progress: **50% Complete**

Totals

File Import Results

PRINT REPORT

Import Census Report

Job Status:	Successful
Plan ID:	DEMO
Plan name:	DEMO PLAN
DER name:	Termination Data
Mode:	Validate Only
Transfer processed on:	06/09/2021
Execution Errors	
None	
Special Instructions	
There were no notes assigned to this job.	
Existing employees updated:	2
New employees added:	0
Total employees transferred:	2
Total employees NOT transferred:	0
Client import errors:	0
Oracle server import errors:	0
Validation Rules	
General Validation Messages	

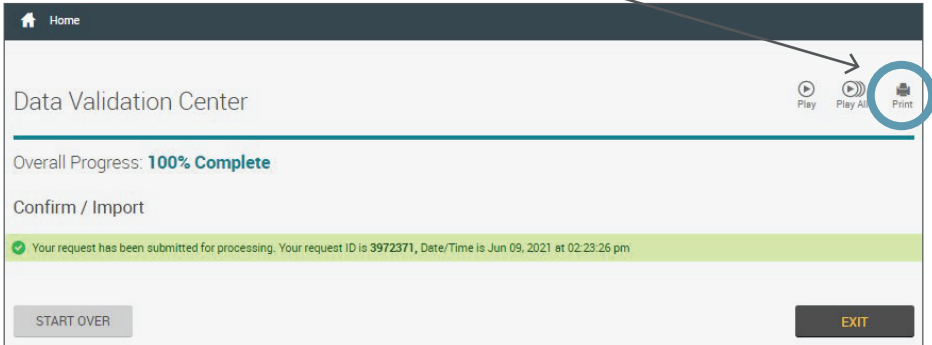
File Submission

Submit for final processing

Process another file

START OVER BACK COMPLETE

You will see a final confirmation screen. We recommend printing this to a PDF for your records so that you can reference the request ID if any questions arise.



Manually Submitting a Participant Termination:

To manually add a participant's termination information, select the "Manually enter new employee information" option and make sure the drop down menu below has "Termination Data" listed. Click "Next."

A screenshot of a web application interface. At the top left, there is a dark blue header with a home icon and the text "Home". Below the header, the main content area has a light gray background. The title "Data Validation Center" is displayed in a large, dark font. Below the title, there is a section titled "Process selection" with a dropdown menu showing "Demographic". Below that, there is a section titled "Process Method:" with three radio button options. The first option is "Upload a file containing the demographic data". The second option is "Manually enter new employee information", which is selected with a blue radio button. Below this option is a dropdown menu showing "Termination Data" and a gray button labeled "DATA FORMAT". The third option is "Work with existing demographic file".

Click on “Add Existing.”

Data Validation Center Play Play All Print

Overall Progress: **0% Complete**

Edit Data

Save Undo Delete Refresh Add All Add New Add Existing Validate Records Print Errors Print Grid Download

Search for the employee by first name, last name, or SSN. You may also scroll through the list of employees. Click “Add” once you have found the employee you want to terminate. You can add multiple employees at once during this step by clicking “Add” behind each employee’s name you want to terminate. Once you have added all of the employees that you need to terminate, click “Continue.”

Add Employee Records X

Create employee records by using the Search criteria section to locate specific employees that are not already in the file.

Search Criteria

Find name

First name Last name

Find SS#

SEARCH

Social Security #	Name	Select EE
444543210	Smith, Jane	Add
444567891	Smith, Jane	Add
110104615	Smith, Jennifer	Add

Page 1 of 1 50 items per page

Add Records

Social Security #	Name	Remove EE

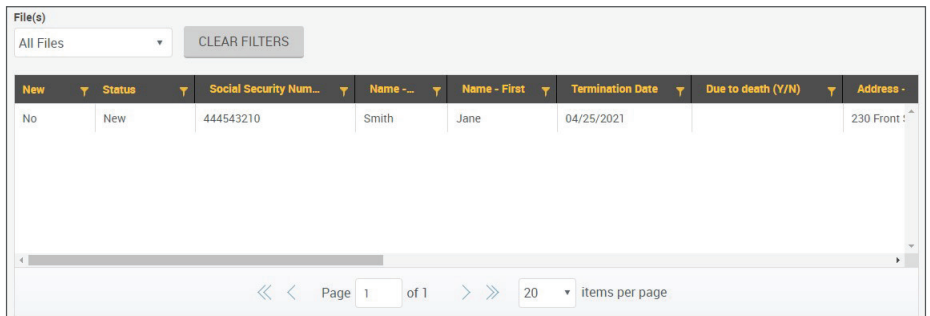
CANCEL **CONTINUE**

Starting with the social security field, please review the information that populates (SSN, first and last name, address, phone number, email) for all of the employees on the list.

- Make sure that the participant's personal email is shown in the "Internet Address – Other" field. If their work email is included, please update or delete if you do not have a personal email for them.

You will need to tab through and enter information in all fields (termination date, due to death, phone/email if missing, years of service, today's date).

- For most participants, the "Due to Death" question will be marked with an "N". Only include a "Y" if the participant is terminating due to death.
- For Plan Sponsor YOS (Years of Service) Vesting, please include the total number of years from original hire date in which the participant worked >1,000 hours, including the current year.
 - Make sure to check your plan document to determine if the years of service apply to a calendar year or an anniversary year. A majority of plans will report based on total calendar years worked with 1,000 hours.

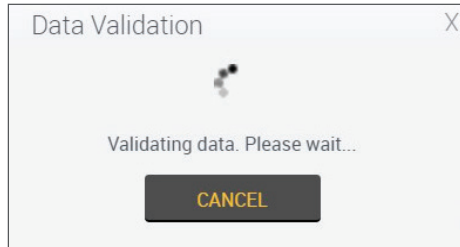


The screenshot shows a data table interface with a search bar at the top left containing "All Files" and a "CLEAR FILTERS" button. The table has the following columns: New, Status, Social Security Num..., Name -..., Name - First, Termination Date, Due to death (Y/N), and Address -... The first row of data shows: No, New, 444543210, Smith, Jane, 04/25/2021, and 230 Front:...

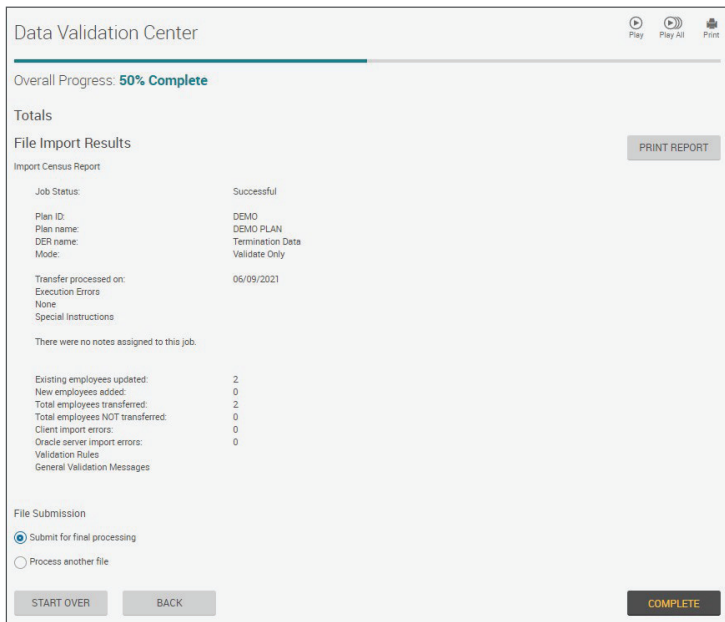
New	Status	Social Security Num...	Name -...	Name - First	Termination Date	Due to death (Y/N)	Address -...
No	New	444543210	Smith	Jane	04/25/2021		230 Front:...

At the bottom of the interface, there is a pagination control showing "Page 1 of 1" and a dropdown menu set to "20 items per page".

Once you are done entering the information for your terminated employees, click “Next.” You will get a validation message.



To complete the process, you should see a progress screen at 50% with a job status of “successful.” Make sure that “Submit for final processing” is selected at the bottom of the screen and click on “Complete.”



The screenshot shows the "Data Validation Center" interface. At the top right, there are icons for "Play", "Play All", and "Print". Below the title, a progress bar indicates "Overall Progress: 50% Complete".

Totals

File Import Results PRINT REPORT

Import Census Report

Job Status:	Successful
Plan ID:	DEMO
Plan name:	DEMO PLAN
DER name:	Termination Data
Mode:	Validate-Only
Transfer processed on:	06/09/2021
Execution Errors:	None
Special Instructions:	

There were no notes assigned to this job.

Existing employees updated:	2
New employees added:	0
Total employees transferred:	2
Total employees NOT transferred:	0
Client import errors:	0
Oracle server import errors:	0
Validation Rules:	
General Validation Messages:	

File Submission

Submit for final processing

Process another file

START OVER BACK COMPLETE

You will then see a final confirmation screen. We recommend printing this to PDF for your records so that you can reference the request ID if any questions arise.



Questions?

Contact a member of the Retirement Plan Services Team



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