Designate Your Beneficiaries Online

Fill out the beneficiary designation section to tell Trust Point who you would like to inherit the money from your 401(k) in the event of your passing. You may designate one or more person(s) as your beneficiary. This does not have to be a family member. The total balance will be split equally among your named beneficiaries unless otherwise indicated.

As your situation changes and life events occur, make sure to review your beneficiaries and keep them updated.

Primary Beneficiary

Your primary beneficiary is the person(s) who would receive your money first. If you are married, the sole primary beneficiary must be your spouse. Naming anyone else will be considered void, unless prior consent is received by your spouse. A Beneficiary Designation form must be signed and notarized, then given to your HR department or emailed to Trust Point at retirementplanservices@trustpointinc.com.

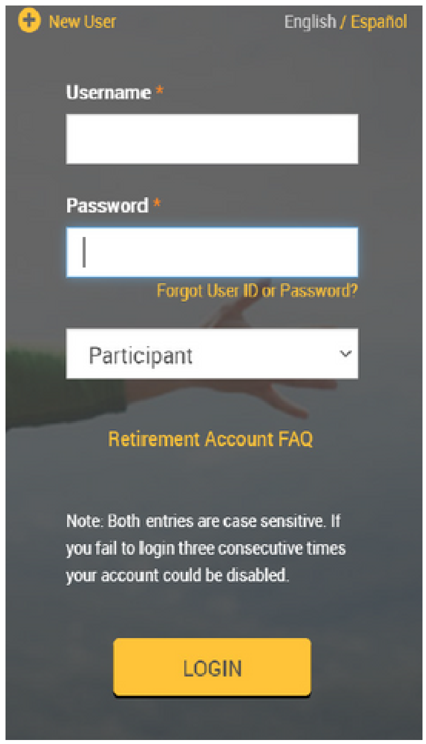
Contingent Beneficiary

Your contingent beneficiary is the person(s) who would receive your money if your primary beneficiary predeceased you and you did not name a different primary beneficiary.

Add or Update Your Beneficiary Information

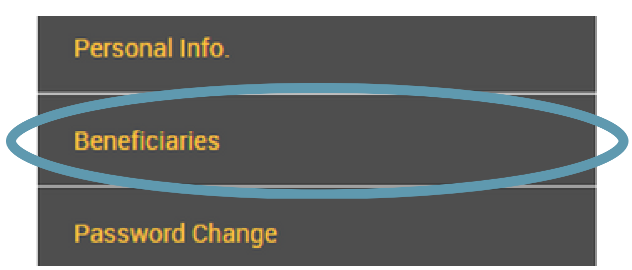
1. Visit https://www.accountplanaccess.net/trustpoint/ to get started.
2. Enter your Username and Password.

   Please refer to your Enrollment Guide for additional login information. If you need further assistance, please contact our Retirement Plan Services Team.



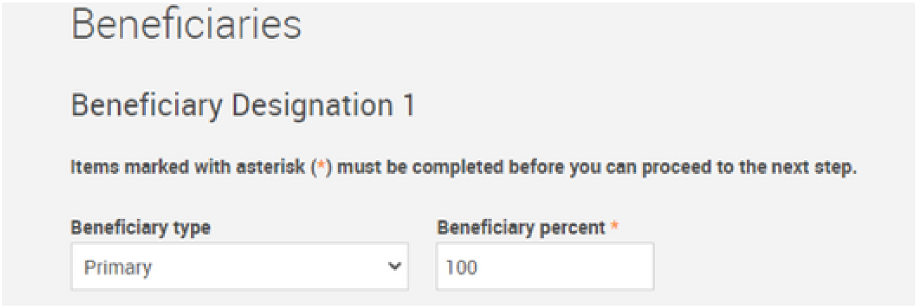
3. A one-time PIN will be required.
4. Once logged in, click on the settings symbol on the top right of the screen.

5. Then, select ‘Beneficiaries‘.



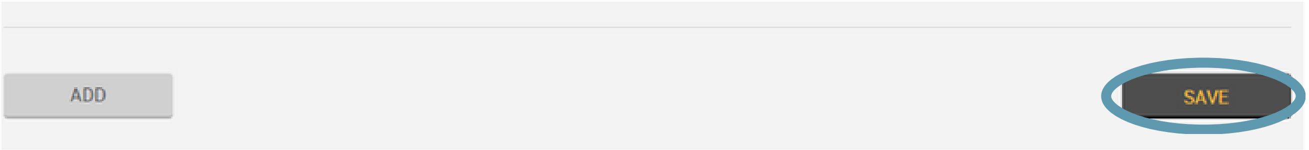
6. Complete the ‘Beneficiary Designation 1’ section. Be sure to select both your ‘Beneficiary type’ and ‘Beneficiary percent’.

NOTE: At least one primary beneficiary is required, but you may choose up to four primary beneficiaries. Zero contingent beneficiaries are required; however, you may choose up to five contingent beneficiaries.



If you want to add a contingent beneficiary (or add multiple primary beneficiaries), click ‘ADD’.

7. Once you have added your beneficiary information, click ‘SAVE‘.



Please contact the Retirement Plan Services team by calling 800-458-9111 or emailing retirementplanservices@trustpointinc.com if you have questions or need additional assistance.