

Elevate Your Retirement

Retirement Plan Enrollment Guide



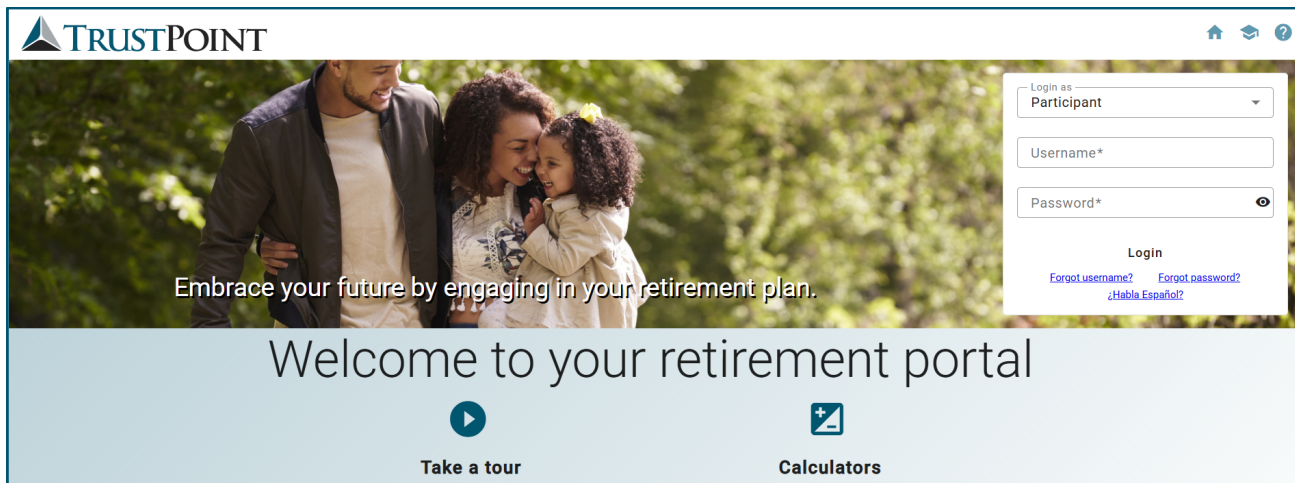
Enrolling Is Easy!

Follow these simple steps to enroll in your company's retirement plan.

Set Up Your Retirement Plan Account Online

1. Register for Online Access

Navigate to www.go-retire.com/trustpoint to get started.

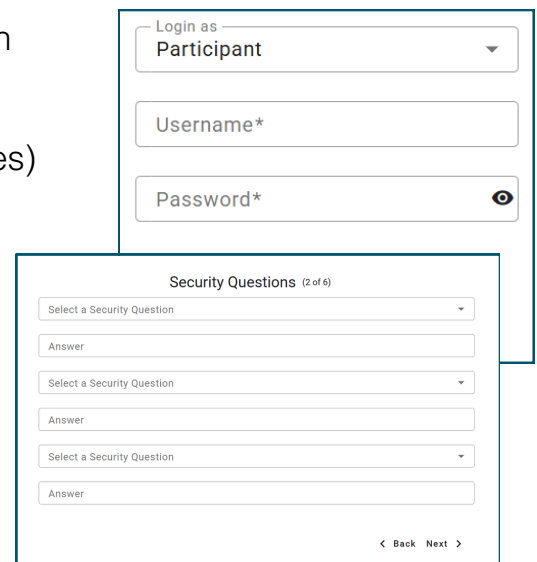


The screenshot shows the TrustPoint retirement portal login page. At the top left is the TrustPoint logo. Below it is a large image of a family (a man, a woman, and a young child) with the text "Embrace your future by engaging in your retirement plan." Below the image is a light blue banner with the text "Welcome to your retirement portal". Below the banner are two buttons: "Take a tour" with a play icon and "Calculators" with a calculator icon. On the right side of the page is a login form with a dropdown menu labeled "Login as" with "Participant" selected. Below the dropdown are input fields for "Username*" and "Password*" with a toggle for password visibility. Below the password field is a "Login" button and two links: "Forgot username?" and "Forgot password?". At the bottom of the login form is a link: "¿Habla Español?".

Ensure "Participant" is selected under "Login as." Then log in using the following temporary credentials*:

- Username: Your Social Security number (no dashes)
- Password: Your 8-digit date of birth (MMDDYYYY)

After logging in, you will be prompted to verify your identity, create a unique Username and Password, and set up your security questions. Your password must be 8–20 characters and include an uppercase letter, a lowercase letter, a number and a special character, with no spaces.



The screenshot shows the Security Questions setup page. At the top is a dropdown menu labeled "Login as" with "Participant" selected. Below the dropdown are input fields for "Username*" and "Password*" with a toggle for password visibility. Below the password field is a "Login" button and two links: "Forgot username?" and "Forgot password?". At the bottom of the login form is a link: "¿Habla Español?". Below the login form is a section titled "Security Questions (2 of 6)". It contains three rows, each with a dropdown menu labeled "Select a Security Question" and an input field labeled "Answer". At the bottom right of the section are links: "< Back" and "Next >".

**If you previously had an account with another employer on the go-retire platform, you may need to use your existing login credentials instead of the default Social Security number login. If you have trouble logging in, please contact us.*

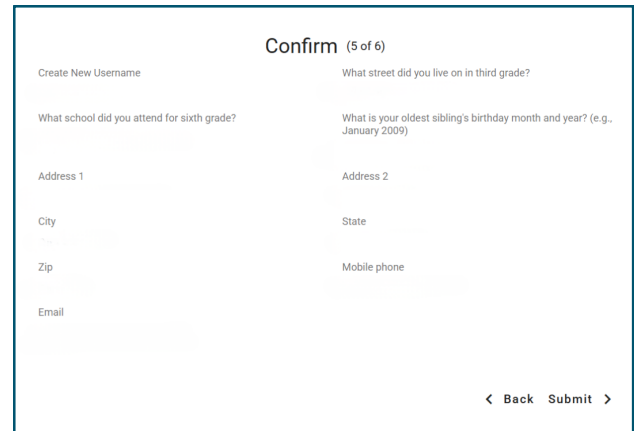
Important: Creating and maintaining a unique username and password helps protect your personal information and keep your account secure. Please log in and update your credentials, even if you do not plan to enroll at this time.

Enrolling Is Easy!

2. Verify, Enter, or Update Your Personal Information

Next, review, enter, or update your personal information, including your home address and contact information. An email address is required.

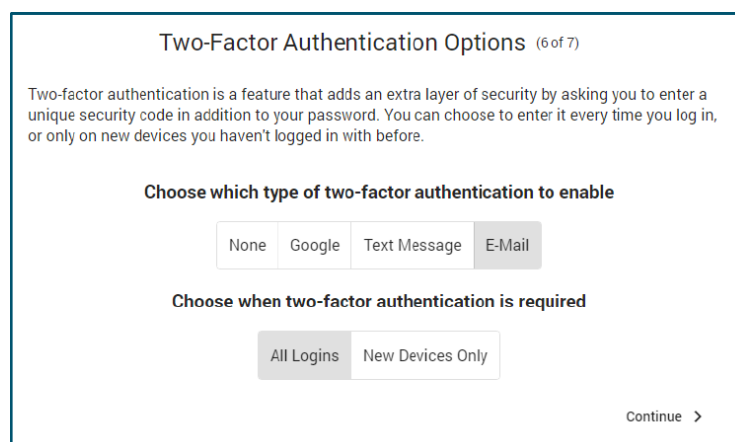
Review your information for accuracy, then click “Submit” to continue.



3. Two-Factor Authentication

You can add an extra layer of security to your online account by enabling two-factor authentication.* Choose your preferred authentication method (none, Google Authenticator, Text Message, or E-Mail) and when authentication is required (all logins or only logins from a new device).

If you enable two-factor authentication, a passcode will be sent using your selected method. Enter the passcode you receive and click “Submit” to continue.



**Regardless of your Two-Factor Authentication settings, you will receive an email notification whenever your account is accessed from a new device. If you receive a notification and do not recognize the login activity, contact your plan administrator immediately.*

Enrolling Is Easy!

4. Complete Your Enrollment

The Enrollment Wizard will guide you through the remaining steps to review your information and make your elections, including:

- Personal Information
- Investment Elections
- Plan Contributions
- Beneficiary Designations

Before completing your enrollment, you will have an opportunity to review your elections and make any changes, if needed.

Welcome To Online Enrollment

1 Disclosures

We'll guide you through confirming your current elections or making new choices for:

- Investment elections (how your contributions are invested)
- Plan Contributions
- Beneficiary updates

You can start contributing once you meet your plan's eligibility and entry requirements. Based on our records, you're eligible to enter the plan on or after 05/01/2019.

After completing all steps, review and **confirm** your selections. Your changes will only take effect after you click **Confirm** at the end of the wizard. Once confirmed, we'll notify your employer. [Skip For Now](#)

☒ I consent to electronic delivery of my Quarterly statements.

Continue >

2 Beneficiaries

3 Review

4 Results

After reviewing your elections and making any necessary changes, click the “Confirm Changes” button to complete your enrollment. A Results page will appear confirming your elections, and a confirmation email will be sent to the email address associated with your account.

Have Retirement Savings Elsewhere? Your Plan Accepts Rollovers

If you have an IRA or a 401(k) plan from a previous employer, you may be able to roll those assets into your new retirement plan account.

Consolidating your retirement savings may make it easier to manage your accounts and keep track of your retirement goals.

To learn more about the rollover process, contact Participant Services at (800) 716-3742.

GoRetire Mobile App

No matter where you are*, you can stay connected to your retirement account without interrupting the rest of your day.

Today, many people rely on their smartphones and mobile devices to manage important aspects of their financial lives. That's why Trust Point offers the free GoRetire mobile app, providing participants with convenient, secure access to the same online account information, features, and transactions available through their retirement plan—anytime, anywhere.

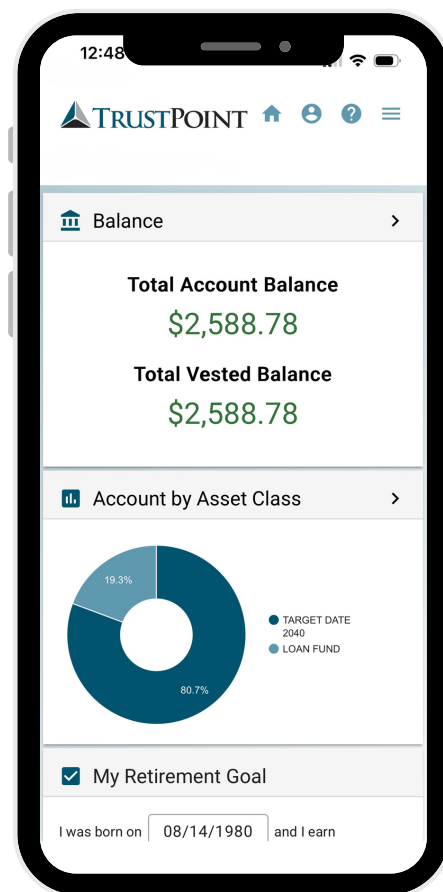
The free GoRetire app is available on iOS and Android devices.

Scan the QR codes to download today!

iOS



Android



GoRetire

**To protect your information when using public wireless hotspots, avoid using mobile apps that require personal or financial information. (Source: Federal Trade Commission, Tips For Using Public Wi-Fi Networks)*

Questions? Get in Touch

go-retire.com/trustpoint



Help@goretire.com



(800) 716-3742



Participant Service Representatives
can be reached toll free Monday
through Friday from 7am-7pm CST.

