

# 24/7 ACCOUNT ACCESS

## WEBSITE ACCOUNT ACCESS

1. Go to [www.icapitalforme.com](http://www.icapitalforme.com).
2. Established users can log in with the same User ID and Password. Never accessed the participant website? Use your Social Security Number as your User ID and your 6-digit PIN as your Password. Your PIN is the last 4 digits of your Social Security Number followed by the last 2 digits of your birth year.

**Questions?** Our customer service representatives are eager to assist you Monday through Friday, 8 a.m. to 7 p.m., Eastern time at 877.459.4568.

## TELEPHONE ACCOUNT ACCESS

1. Call 877.459.4568.
2. Enter your Social Security Number.
3. Enter your 6-digit PIN which is the last 4 digits of your Social Security Number followed by the last 2 digits of your birth year.
4. Navigate by following the prompts.
  - Press 1 for account information or to make changes to your account.
  - Press 2 for loan information.
  - Press 3 for investment pricing.
  - Press 6 to change your PIN.

## PARTICIPANT WEBSITE HIGHLIGHTS

### SUMMARY

- View customized alerts regarding your plan or your company.
- Access high-level, “at-a-glance” summary information.
  - Year-to-date Account Balance
  - Personal Rate of Return
  - Balance History
- View name, address, and profile information in **Edit My Profile**.
- Use calculators to help plan your retirement.
- Download the most recent **Future Focus** newsletter.

### MY BALANCE

- View balance by investment, source, or asset class.
- Query an activity summary by investment or source.
- Download your account history directly to Quicken or in a universal CSV format.



### MY CONTRIBUTIONS

- **Contribution Summary** provides:
  - “At-a-glance” contribution history, by source, for each year with Alerus.
  - Your year-to-date contributions by source.
- Click on **Contribution Investments** to view how your future contributions are being invested.



### CHANGE MY INVESTMENTS

- Use step-by-step instructions to:
- Change how future contributions are invested.
  - Change how your current account balance is invested.
  - Transfer specific amounts.
  - Establish a schedule to automatically rebalance your account.
  - View pending transactions.



### INVESTMENT PERFORMANCE

- View Personal Rate of Return for stated time frames or a specific date range.
- Access fund performance, expense ratios, and prospectuses.
- Search for investments prices by date, or simply view the daily change in price.
- View timely updates on current market events and financial news.

### MY STATEMENTS

- Retrieve copies of your quarterly personal statements.
- View the confirmation of activity you initiated in your account.

**CHANGE MY CONTRIBUTIONS** and **LOAN CENTER** will appear if your plan allows the feature.

This information is provided for informational and discussion purposes only.

Investment products (1) are not FDIC insured, (2) are not deposits or other obligations of a bank or guaranteed by a bank, and (3) involve investment risk, including possible loss of principle amount invested.