

Instructions for Setting up My Participant Account

We are pleased to provide you with access to the Cash Balance Daily Access website, the Retirement Center. To set up your account, go to www.portal.kravitzinc.com.

Retirement Center

New Participants: [Enroll Now](#)

Welcome! Please Login Here

Email Address

Password

Remember me [Forgot your password?](#)

Login

New Participants: **ENROLL HERE**

Having problems logging in? Call Retirement Center Support at (888) 761-1055

On the Login page, click on Enroll Here. The New Participant Enrollment page will display.

Retirement Center

Current Clients: [Login](#)

New Participant Enrollment

We are pleased to provide you with online access to your Cash Balance account. To set up your account, enter the information requested below. Once you submit this information and the system has verified it, you will be prompted to enter a password.

Email Address

Social Security Number (without dashes)

Date of Birth (mm/dd/yyyy)

Select a security question

Security Answer

Submit

Already have an account? [Login Here](#)

Enter your email address, social security number and date of birth. Select a security question.

Enter your password, reenter security questions and answer and click Submit.

Please set your new password.

Password

Confirm Password

Security Question
Select a security question

Security Answer

[Submit](#)

Password must be at least 8 characters long and must contain at least 1 number


Password Strength

Once you have completed this process, you will be prompted to Go to Participant Page.

Your password has been set.

[Go to Participant Page](#)

The Participant Page displays your Personal Information, Account Balance, some helpful tips, and tools and resources.



Congratulations! Your employer has provided you with a valuable benefit designed to build your retirement security. A Cash Balance plan expands your retirement benefits beyond a standard defined contribution plan such as a 401(k).

Account Info

Name: REY, FINN

Birth Year: 1983

Date of Hire: 11/01/2010

Date of Entry: 01/01/2013

Please review the personal information displayed here for accuracy and contact your HR representative to make any changes. The accuracy of this information is important in determining your retirement benefits.

Plan Name: AAA Professional Group, Inc. Cash Balance Pension Plan

Account Balance: \$36,683.39

Vested Balance: \$36,683.39

The "vested" portion of your account is the part that belongs to you and cannot be forfeited if you leave your job. Vesting is typically based on how long you have been participating in the Cash Balance plan, and could be from 1 to 5 years. Ask your HR representative to confirm your vesting schedule.

Please note: The contribution you have earned for 2015 is not viewable online until after the annual plan administration is complete and transactions are posted. The date your annual contribution displays online will vary.

Is your beneficiary designation up to date? It's important to review beneficiary designations whenever you experience life changes such as marriage, divorce, death of a spouse, or birth of children. The beneficiary designations for your retirement savings plans take precedence over your will. Please contact your HR representative to confirm or update your beneficiaries.

Tools and Resources

- [Introduction to Cash Balance plans](#)
- [Social Security Retirement Benefits - An Overview](#)
- [Retirement Toolkit](#)
- [When to Start Receiving Retirement Benefits](#)
- [Retirement Estimator](#)
- [Distribution Election Form](#)

When you are ready to leave the website, click Logout to close your account.

Welcome, FINN | [Logout](#)