

## Plan Sponsor Access to Personal Participant Portal

The new Retirement Center includes our Cash Balance Daily Access online portal. Plan participants can instantly view their Cash Balance account information and access helpful retirement planning tools.

As a plan sponsor, you may also be a participant in the plan. To set up your individual participant account, login into the Retirement Center as a Plan Sponsor. Click on Enroll in the upper right hand corner of the plan page.



The New Participant Enrollment page will display. Enter your email address, Social Security Number and Date of Birth, then choose a personal security question. Click submit to finalize your account.

The screenshot shows the Retirement Center portal with the "New Participant Enrollment" form. At the top left is the text "Retirement Center" in red. At the top right, it says "Welcome, Kytlo" followed by "Logout", "Enroll", and "Files" buttons. The main content area is a grey box with the title "New Participant Enrollment" and the following text: "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." Below this text are five input fields: "Email Address", "Social Security Number (without dashes)", "Date of Birth (mm/dd/yyyy)", "Select a security question" (a dropdown menu), and "Security Answer". At the bottom of the form is a red "Submit" button. Below the form is the text "Already have an account? [Login Here](#)".

Your plan sponsor account will now be linked to your personal participant account information. A confirmation screen will display which provides links to either your participant page or the plan sponsor site. Click on the link to access the desired website.

## New Participant Enrollment

You have successfully enrolled as a participant. Use your existing login to access both participant and sponsor sites. Access [participant here](#) and [sponsor here](#).