

Online Enrollment Instructions

Before You Begin:

Access to the 401k site will open up 15 days prior to your entry date, the entry dates are quarterly (1/1, 4/1, 7/1, and 10/1). Please refer to your plan documents for more details.

Getting Started:

To start the enrollment process, you may access your account by following these simple steps:

- Visit <https://evolveretirement.com/client-login>
 - Click on LOGIN under Participant Access
 - Your initial login username is your Social Security Number (with no dashes)
 - Your initial login password is your Date of Birth (**mmdyyy**)
 - Click "Login"
 - If you are unable to move past the login screen, please call (805) 369-6020.
1. Once you login you will be prompted to change your password, your User Id and establish a "Secret Question and Answer".
 2. Next you will be provided three choices related to the Automatic Contribution Arrangement (ACA). ACA is the default amount of pre-tax deferral contribution that your Employer has elected to withhold if you do not make an election of your own.
 - a. First Choice - "Keep The Default Options" this will show the amount that will be withheld and keep you enrolled in the automatic escalation of deferrals.
 - b. Second Choice - "Select My Enrollment Options" this option will allow you to select a different deferral amount and continue through the Enrollment guide.
 - c. Third Choice - "Opt Out" this option will change your deferral amount to zero. This election of zero can be changed at anytime.
 3. The following Enrollment pages will be displayed based on the above option that was chosen.
 - **My Information** (*Applies to all Choices*) - On this page you will be required to change your user id and password. Your password must be eight or more characters. Any other information that is missing or incorrect can be updated the following time you login, including your email address.
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- **My Contributions** (*Applies to Second Choice only*) - On this page you will need to select the amount you wish to defer as a percentage of compensation or as a flat dollar amount. This amount can be in the Pre-Tax or Roth source. The amount can be split between the two sources as well.
- **My Investments** (*Applies to First and Second Choices*) - On this page you will choose to keep the default investment or select your own investment mix.
- **My Beneficiaries** (*Applies to all Choices*) - On this page you will need to add your Primary Beneficiary to proceed.

After you complete all of the steps you will be taken to the Online Enrollment Summary page.

- Review the details and then click the “Enroll Me” button.
 - Then exit by clicking “Logout” on the top right.
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Please Note: You will need to wait 1 business day to log back in and see all of the features.

What You Can Do:

With your new online account access, you will have the ability to obtain such information as:

- Total account balance
- Account balance by Source
- Account balance by Fund
- View/Change your ongoing Investment Elections
- Retrieve transaction history
- Access performance information
- Obtain a personalized rate of return
- View current asset allocation
- View general information about your account and participation in the Plan

If you have any questions regarding your account or account access, please contact Evolve Retirement Plan Solutions at [\(805\) 369-6020](tel:8053696020) during normal business hours of 7AM – 5PM Monday – Thursday and Friday 8AM – 2PM PST, or via email at info@evolveretirement.com
