# 24/7 ACCOUNT ACCESS

## WEBSITE ACCOUNT ACCESS

1. Go to **alerusrb.com** and click **Login** in the upper right corner of the screen.
2. You will use a default **User ID** and **Personal Identification Number (PIN)** the first time you log into your account.
   - **User ID:** Enter your Social Security Number (SSN) without dashes or spaces.
   - **PIN:** Enter the last four digits of your SSN, plus the last two digits of your birth year.
4. Next, you will be prompted to create a new **User ID** and **Password**, and enter your email address.
5. On the **Security Questions** page, select and answer the security questions.
6. Click **Log In**.

**Questions?** Our customer service representatives are eager to assist you Monday through Friday, 7 a.m. to 6 p.m., Central time at 800.433.1685.

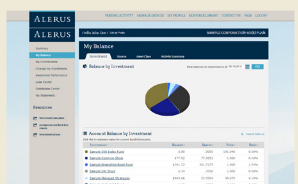
## PARTICIPANT WEBSITE HIGHLIGHTS

### 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
- Use calculators to help plan your retirement.
- Download the most recent **Future Focus** newsletter.
- View name, address, and profile information, and activate online statements in **Edit My Profile**.

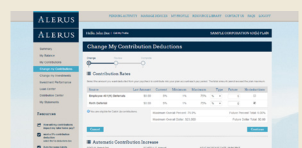
### MY BALANCE

- 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 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**, **LOAN CENTER**, and/or **DISTRIBUTION CENTER** will show if your plan allows the feature.

## TELEPHONE ACCOUNT ACCESS

1. Call 800.795.2697.
2. Enter your Social Security Number (SSN).
3. Enter your PIN, the default PIN is the last four digits of your SSN, plus the last two digits of your birth year.
4. Navigate by following the prompts:
   - Press 1 for account information/changes.
   - Press 2 for loans.
   - Press 3 for investment pricing.
   - Press 6 to change your PIN.



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