

# ACCOUNT ACCESS



## RETIREMENT

1. Go to **alerusrb.com**, click **Log in**, select **My Alerus**, then click **Go**.
2. The first time you log in, you will need to create an account. Click **Sign Up** or **Create Account**. You will need your Social Security number and date of birth. You will also need one of the following:
  - Hire date
  - Alerus retirement plan number
  - Alerus bank account number
  - Alerus bank debit card number
  - Alerus wealth management account number
3. Next, you will be presented with an electronic consent form and terms and conditions. Review and click **Accept**.
4. On the next screen, select a phone number and your preferred method of authentication (text or call). Review and click **Submit**.
5. Enter the six-digit code sent via text or call and click **Submit**.
6. From the My Alerus dashboard, select your plan under Accounts and click the **Plan Summary** link on the right side of the page.

### 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.
- View name, address, and profile information, and manage statement delivery in **My Profile**.

### MY BALANCE

- View balance by investment, source, or asset class.
- Query an activity summary by investment or source.
- Download your account history to import into 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

- 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.

### MY DOCUMENTS

- Retrieve copies of your statements.
- View the confirmation of activity you initiated in your account.
- Download account tax documents.

### CHANGE MY CONTRIBUTIONS | LOAN CENTER | DISTRIBUTION CENTER

Only visible if allowed by your plan.

### TELEPHONE ACCOUNT ACCESS

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

### FOR MORE INFORMATION

#### Client Service Center

800.433.1685  
info@alerus.com

This information is provided for informational and discussion purposes only.

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