Once you have signed in, you can review the current status of your account, make changes, and access tools to help you personalize your retirement strategy. From the main menu, scroll over the five tabs: Dashboard, Transactions, Performance, Statements/Forms, and Support - and select the action you want to take from the drop-down lists.

**Check Account Balance**
- Balance automatically appears on My Dashboard page (in the Dashboard menu at the top of the screen).
- For account balance by fund, review "My Portfolio" on My Dashboard.

**Review Investment Performance**
- To get performance and fee details for all the funds in your plan, simply click on the fund name on any page. This will display performance, as well as links to the fund fact sheet and prospectus.

**Change Future Investment Allocations (new contributions)**
- To choose or change how new contributions will be invested, in the Transaction menu, click "Manage Investments" then "Change Elections".

**Transfer Between Investment Options (current assets)**
- To transfer balances between individual or groups of funds in the Transactions menu, click "Manage Investments" then "Transfer Funds".

**Request a New Loan or View Existing Loans**
- To request a new loan in the Transactions menu, click “Request a Loan”.
- To view existing loans in the Transactions menu, click “View Loans”.

**Request a Distribution**
- From the Transactions menu, select “Request a Distribution”.
- When the page loads, click on the “here” link to submit your request.

**Forms and Beneficiary Information**
- To locate forms and beneficiary information, in the Forms & Reports menu, select "Forms". You can also update your Beneficiary information online by selecting the gear icon in the upper right of the screen.

**Customer service**
- From the Support menu, select "Live Chat" to talk with a Client Care Manager, or "Contact Us" for email and phone information.
Easy access to your account

Call 866-296-9712

Check Account Balance
- Personal account information, press 1; then
- For balance information, press 1.

Review Investment Performance
- Personal account information, press 1; then
- For current investment rates of return, press 2.

Change Future Investment Allocations (new contributions)
- Personal account information, press 1; then
- For investment information, press 2.
  Confirmation sent the following business day.
  Please note that this allocation change impacts only your future contributions.

Transfer Between Investment Options (current assets)
- Personal account information, press 1; then
- To transfer between funds, press 3.
  Confirmation sent the following business day.
  Please note that changing current allocations does not change how your future contributions will be invested.

Customer Service
- From the main menu, for customer service, press 1.

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