

## MANAGING YOUR ACCOUNT ON INVESTLINK

We're in the final stages of preparing for the InvestLink<sup>SM</sup> migration of your PPS retirement plan. Our goal is to ensure that you are comfortable with the InvestLink platform and ready to easily access your account. We have prepared this information sheet to provide you with an overview of how to manage your InvestLink account when the migration is complete.

### Please read below to learn what you need to know for a successful transition.

- Important Dates and Details
- Distributions and Loans
- Accessing your Account
- InvestLink Features and Functionality

### Important Dates and Details:

It is vital that you are familiar with the timeline.

1. The migration will begin at 4:00 p.m. ET on Tuesday, January 31, 2017 and end Monday, February 13, 2017.
2. During this time there will be a Blackout Period, which means:
  - Plan Sponsors are unable to process contributions
  - You are unable to:
    - Direct or diversify investments
    - Obtain a distribution/loan
    - View your account online
3. You will NOT be out of the market at any time.
4. You should have received the Blackout Period Notification from your Plan Sponsor.

### Distributions and Loans

The Distribution & Loan wizard is a self-guided system designed to walk you through the process of requesting a withdrawal, showing only the options available based on plan parameters, account status, age, balance, etc.

This system:

- Calculates federal and state withholding
- Generates a signature-ready confirmation
- Reduces requests that are Not In Good Order (NIGO), which may delay distributions
- Allows your Plan Sponsor and/or the TPA to approve distributions before they are processed

### Accessing your Account

To access your account on and after February 13, 2017, follow these directions:

**Website URL:** The new website address is: **Investlink.Aspireonline.com.**

Please feel free to bookmark this page for your reference.

**Username:** Social Security number (no dashes or spaces).

**Password:** Birthdate entered as MMDDYYYY.

Once you login, you can visit the Profile tab to update your username and password and set your account preferences. Your new password must be exactly eight characters with at least one number and no special characters. You can create a password reminder question under the Profile tab. You will have to contact Aspire if you forget your password and do not have a reminder question set up.

**In the new Participant portal, you can look forward to:**

- Easy-to-use navigation tools and mobile capabilities
- Distribution & Loan wizard
- On-demand statements and optional weekly email statement summary
- Transaction email confirmations
- Easy model view and management
- Transaction capabilities, rebalance options and scheduled transfers
- Educational tools and materials customized by life stages

**Learning about InvestLink**

After login to your new account, you may view the instructional videos directly on the screen or consult the Document Library (located under the Services tab) for additional materials.

We thank you for your patience and understanding during this transition. If you have any questions, please contact your Plan Sponsor, or call 888.445.0031, Option 1 for Prime Plan Solutions plans Monday – Friday, 8 a.m. – 8 p.m. ET. We look forward to working with you.