

Account Access

www.BEONretirement.com/log-in
Choose Participant Log-In

PERSONAL INFORMATION:


What should I do if I cannot remember or do not know my password?

- Email pwc@beonretirement.com from your *corporate email address* to have your access reset. If you do not have a corporate email address, please have your human resources department contact us from their corporate email address.

IMPORTANT: If you have not logged in before, or if it has been awhile since you logged in, you may be guided through an Account Setup wizard. This may include: creating a new Password; adding an Email Address; creating a Login ID; and selecting and answering Security Questions.

NOTE: The “Personal” email address you enter can be the same as the “Work” email address shown. Your “Work” email address is shown for reference. If you wish to change your “Work” email address, send an email to pwc@beonretirement.com from your *corporate email address*.

Where do I update my Personal Information when logged into the website?

- All settings related to your personal information can be found by clicking the My Profile ( MY PROFILE) icon in the upper right of the screen.

The following options are available under the My Profile icon:

- Login ID
- Password
- Personal Email Address
- Security Questions
- Phone Number
- Beneficiaries
- Delivery Preferences (see important note below)
- Address

REGARDING DELIVERY PREFERENCES: The security of your retirement account information is just as important as the security of your bank account and credit cards. We strongly recommend that you set your delivery preferences so that you are notified by email of any changes made to your account. This is a critical security tool as you will be automatically notified if anyone changes the security credentials on your account or makes any financial changes to your account. Opting out of these notifications eliminates the first line of defense of anyone trying to access your information and your account dishonestly.

Account Questions:

Use the Contact Us link in the bottom right of the screen or send an email to pwc@beonretirement.com from your corporate email address

PLAN INFORMATION:

Where do I find information about the Plan and how it works?

- Click Home
- Summary Plan Description
- Plan Highlights

ACCOUNT BALANCE AND INVESTMENTS:

***NOTE: Not all options in this section will be available depending on the plan setup and provisions.**

What is my current account balance?

- After logging in, the Home page provides your current balance in addition to recent activity, notifications and other important account information

***How do I change the amount deducted from my paycheck?**

If this option is not available, the Paycheck Deduction Form is located on the Forms menu. Please follow the instructions on the form.

- Click Manage
- Manage Contributions
- Contribution Rate/Amount – Take Me There

***How do I change where my contributions are invested?**

- Click Manage
- Manage Contributions
- Future Contributions – Take Me There

***How do I change where my current account balance is invested?**

- Click Manage
- Your Portfolio
- Portfolio Rebalance – realigns your entire account balance according to the investments and percentages you choose
- Investment Transfer – transfer an amount from one investment to one or more investments

***How do I access information about the Plan Investment Options?**

- Click Learn
- Investment Performance
- Investment Performance – Take Me There

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OTHER MENU ITEMS:

***NOTE: Not all options in this section will be available depending on the plan setup and provisions.**

***How do I rollover a balance from a prior employer or IRA?**

- Click Forms
- Rollover Contribution Guide
- Contact the provider of the account you wish to transfer into the Plan for their procedure/form to process the rollover

***How do I apply for a loan?**

- Click Manage
- Withdrawal
- Loan Modeling – Take Me There
- Review the Loan Guidelines under Manage – Loan Guidelines

How do I apply for a distribution?

- Click Forms
- Distribution Request Guide
- Review the Special Tax Notice under Forms – Distribution Special Tx Notice

***How do I print out my 1099R Tax Forms?**

- Click View
- Tax Forms
- Tax Forms – Take Me There

How do I print an account statement?

- Click View
- Performance & Statements
- eStatement – a copy of your quarterly statement
- Statement on Demand – create a statement of activity during the period of your choosing (maximum of 10 years)

EDUCATION:

What is available to learn about retirement and investing?

- Click Home – Your Account – Video Learning Center
- Click Learn – On Course Planning Guide
- Click Learn – Financial Calculators

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