

Your Online Enrollment Process

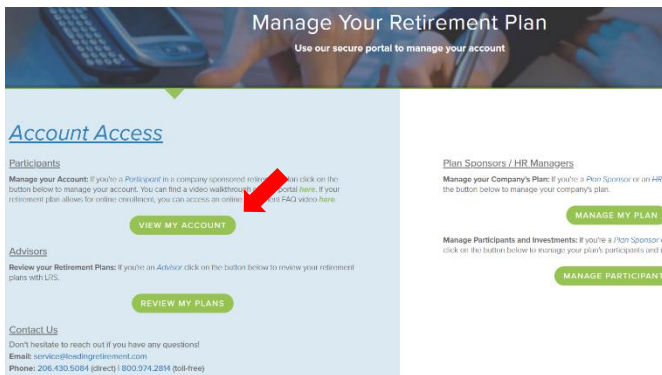
Follow the steps below to enroll in your plan once you become eligible.

You can also view a video at www.LeadingRetirement.com/go/online-enrollment.

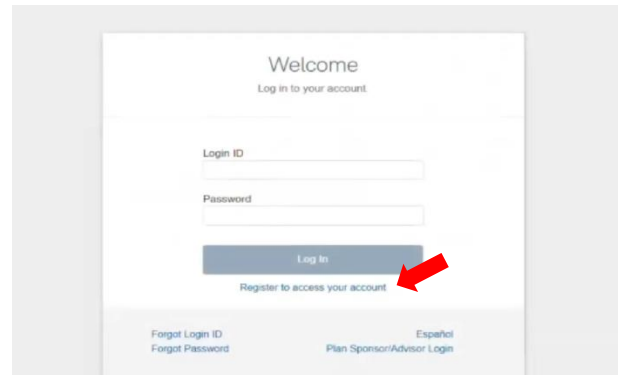
Part 1: Identity Verification

1) Go to www.LeadingRetirement.com/Portal

click “View My Account”.



2) Click “Register to access your account” to start your registration.



3) First, verify your identity by entering your personal information, then click “Save and Continue”.

Note that the SSN does not need dashes, but the Date of Birth does need slashes (ex. MM/DD/YYYY).

Workplace Information is not required unless your employer provided these items.

Please Note: This system information is provided by your employer. Please use the same information supplied to the company. If you cannot complete your identification verification, please call Participant Support at (206) 430-5084.

Personal Information
We need this information to identify you and your account. Use your legal name, not a nickname.

First Name

Last Name

Social Security Number

Confirm Social Security Number

Date of Birth (mm/dd/yyyy)

Contact Information
Please provide at least one way for us to contact you.

Home Phone Number

Mobile Phone Number

Personal Email Address

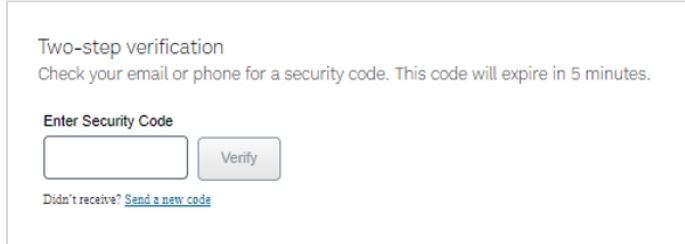
Workplace Information
If your employer has provided you with this information, enter it below.

Work Phone Number

Work Email Address

Employee ID

4) Next, you will be prompted to Two-Step Verification. A one-time code will be sent. Enter this code to proceed.

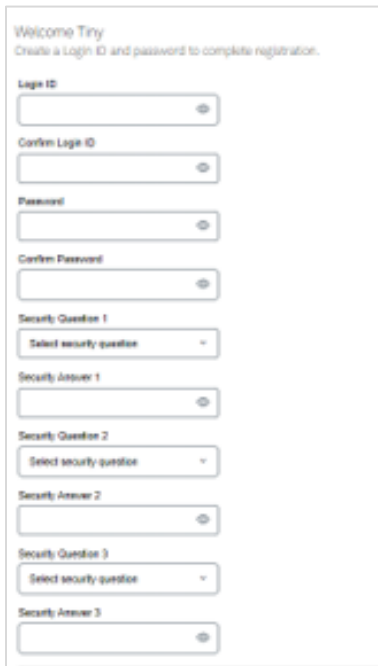


Two-step verification
Check your email or phone for a security code. This code will expire in 5 minutes.

Enter Security Code

Didn't receive? [Send a new code](#)

5) Upon successful account identification, you will be prompted on the next screen to set up your new login credentials.



Welcome Tiny
Create a Login ID and password to complete registration.

Login ID

Confirm Login ID

Password

Confirm Password

Security Question 1
Select security question

Security Answer 1

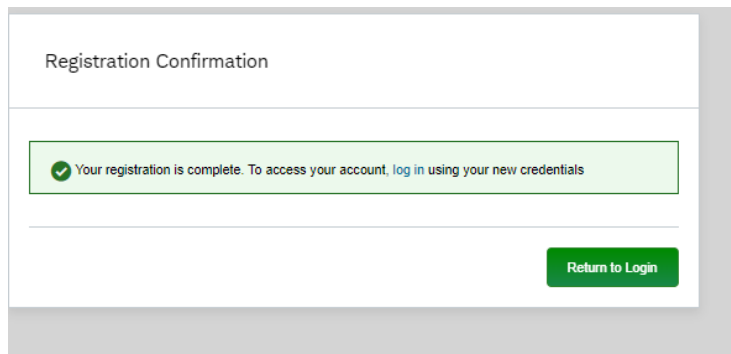
Security Question 2
Select security question

Security Answer 2

Security Question 3
Select security question

Security Answer 3

6) Registration is now complete. You'll be prompted to return to the Login page



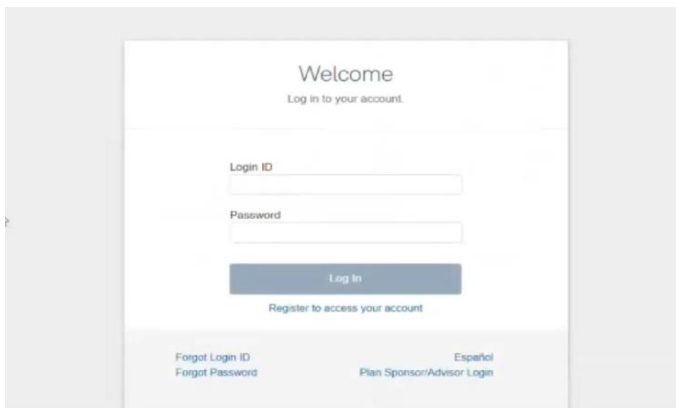
Registration Confirmation

✓ Your registration is complete. To access your account, [log in](#) using your new credentials

[Return to Login](#)

Part 2: Account Access

7) Log in with your new login credentials.



Welcome
Log in to your account.

Login ID

Password

[Log In](#)

[Register to access your account](#)

[Forgot Login ID](#) [Forgot Password](#) [Español](#)
[Plan Sponsor/Advisor Login](#)

8a) Set up with personal email address, enter password to save.

1. Email Address

Provide a personal email address that you check regularly. We will use this to notify you about activity in your account.

Work Email Address
Your work email is on file as kimberly.velazquez@leadingretirement.com. This address was provided by your employer and cannot be changed here. If it is incorrect, please [contact your recordkeeper](#).

Personal Email Address
sample@leadingretirement.com

Confirm Personal Email Address
sample@leadingretirement.com

Continue

8b) Establish two-step verification frequency.

Two-Step Verification

Delivery method
Send my security code via:

☐ Email
• c.t@schwab.com

☒ Text message
☐ (xxx)-(xxx)-3333
☐ (xxx)-(xxx)-2222
☐ (xxx)-(xxx)-8220

Frequency

Frequency
Verify my identity with a security code:

☐ Only on untrusted devices

☐ Every time I log in

Please provide your password to confirm your new two-step verification settings.

Password
| |

Continue

Message and data rates may apply. [Terms and Policies](#)

Part 3: First Time Enrolment

9) Next, begin your enrollment process. The Online Enrollment Wizard will walk you through each step. The wizard will help you set your e-Delivery preferences, contribution amounts, and investment elections where your contributions will be invested. Please note that you must complete the entire process for changes to take effect.

Enrollment Progress: Start > My eDelivery > My Information > My Contributions > My Investments > My Beneficiaries > Finish

Welcome to Online Enrollment

1. The enrollment wizard will guide you through all the steps to ensure you have fully completed the enrollment process. You may choose to complete the steps in any sequence.
2. A check mark appears when you successfully complete each task. You must complete the entire enrollment process before your requests are processed.
3. Before you submit your enrollment request, you will have the opportunity to view and/or change each request on the Online Enrollment Summary page.

Note: Your Password change will take effect immediately.

Step 1 My eDelivery ☒

Step 2 My Information ☐

Step 3 My Contributions ☐

Step 4 My Investments ☐

Step 5 My Beneficiaries ☐

Enroll Now

10) Before you submit, you will see a summary of all the selections and updates made. To make further changes, click the “Edit” button near the desired section. When you are ready, click “Enroll Me” to complete your enrollment.

Enrollment Progress: [Start](#) > [My eDelivery](#) > [My Information](#) > [My Contributions](#) > [My Investments](#) > [My Beneficiaries](#) > [Finish](#)

Online Enrollment Summary
 -Verify your selection in each section.
 -To make changes, select Edit.
 -Select Enroll Me to complete your enrollment.

Edit

My eDelivery

Statements	Email
Financial Transactions	Email
Personal Information	Email
Security	Email

Edit

My Information

Edit


My Contributions

Source	Contribution Type	Amount/Percentage
Employee Deferral	Regular	1.00%
Employee Roth	Regular	5.00%

Edit

My Investments

(100.00%) T. ROYCE PRICE RETIREMENT 2035



Edit

My Beneficiaries

Beneficiary Name	Beneficiary Type	Share Percentage
Sam Winchester	Primary	100.00 %

Enroll Me

I agree that my enrollment information is correct.

Setup Complete! Your enrollment elections will be loaded to your plan so your new elections can start promptly.