



Website Guidance

1075 Broken Sound Parkway NW, Suite 100
Boca Raton, FL 33487-3540

Phone: 800-356-3009 **Fax:** 561-241-1070

Customer Service: 9:00am - 7:00pm Eastern Time

The bottom of the page is decorated with four horizontal bars in blue, green, red, and blue from left to right, matching the top of the page.



FIRST-TIME ENROLLMENT

- In order to enroll for the first time, you will need your payroll company's password: **ESI401k**
 - (the 3rd character is a capital I as in Incorporated)
- * If you have any trouble with this, please contact the Slavic 401k and PlanRight Customer Service Department at 800-356-3009, prompt 7
- Go to www.slavic401k.com
- On the right hand top of the home page, click on the green **Enroll** button 
- Enter your Social Security Number (without dashes)
- Enter your Date of Birth (with the slashes, mm/dd/yyyy)
- Enter your payroll company's password (ESI401k)
- Make sure to complete all the required fields indicated by a red asterisk
- Follow the instructions on each screen
- Once your enrollment is completed, you will receive an email with a confirmation number
- Save for future reference
- Please note that if you are a new employee or if your company has just recently signed up for the 401k plan, you may not have access to your new account until we process the first contribution/deferral file from your payroll company, or until your enrollment information is processed by Slavic401k



NEW ACCOUNT ACCESS

- www.slavic401k.com
- Select **Log In** on the upper right hand corner of the home page
- Enter your Social Security Number with no dashes or spaces as the **Username**
- Enter your date of birth without dashes or slashes as the **password** (ex. 10311956)
- Select **Participant-Investor** at the bottom of the login dropdown menu
- You will be directed to the **Password Change** page
- Please ensure we have an email on file for you. If you have not provided an email address, scroll down to **Edit My Personal Profile**, select **Email**, enter Primary Email, **Confirm Email** then **Submit**
- Click on **Back to Previous page** to create your new log in credentials
- Create a new username and password (case sensitive)
- New username must contain between 6-12 letters & numbers (case sensitive)
- The old password is your date of birth in mmddyyyy format without dashes or slashes (ex. 10311956)
- The new password must contain between 6-15 letters & numbers (case sensitive)
- Click on **Submit**
- You will be prompted to confirm the change of the username and password
- Select **Continue** and you will be provided a confirmation number which will also be emailed to the email address on file (if you have already provided one)
- Make note of your new username and password for future reference
- You will be directed to edit **Personal Info page**

EDIT PERSONAL INFO



 - Allows you the opportunity to edit your personal information, set up your security question and add or change beneficiary information.

- You can now set up a security question that will enable you to login to our website from an unknown computer & reset your login information in the event that you forget your password in the future
- Click on **Security Question**, select a question from the list, enter your answer, and then click on **Submit**
- You will be able to update your email address for our records. The email address provided will be used to send a confirmation number when you make a change in your account (ex. Investment election, contribution or personal information change). The email address will only be used in accordance with the Slavic401k and PlanRight Privacy Policy
- You have the option of updating your mailing address and telephone, please click on the **Settings Icon** next to your name on the upper right hand side of the screen, select **General**, click on **Personal Info** to change then click on **Submit**
- You can also add or update your **Beneficiaries** in this section. Simply click on **Beneficiaries**, complete the **required fields** click on **Add** to add new beneficiary or **Update** to update beneficiary information



CHANGE ELECTION

Allows you the option to change the investment elections available in your plan.

Slavic 401k and PlanRight have the courtesy of providing financial advice to answer any questions you might have about the investments available in your plan. To be connected and speak to one of the Financial Advisor Representatives, please contact Customer Service at 800-356-3009, prompt 7. You now have the option to change your investment elections right from the Dashboard, select **Manage Investments** or follow the steps below:

- Log in to your Slavic401k.com online account
- Select **Manage** from the upper navigation
- Select **Manage Investments**
- Go to **Change Elections** then click on **Get Started**
- Select the fund(s) that you would like to move your money into and enter the new percentage in the far right column labeled **New Election** then click **Next** (new allocations must equal **100%** in order to continue with the process)
- You will be directed to the **Transferable Balances** page to confirm if you want to move current and future contributions to the new selected elections, click **Yes** or **No** (If you click No, you will be directed to read the **Prospectus** page, click on **Next** then **Submit**)
- If you click **Yes**, you will be directed to review and confirm your current and new allocations in percent and dollar amount, if you agree, click **Next**
- You will be directed to Read the **Prospectus Page**, click on **Mark all as Read**, then **Next**
- You will be directed to **Review** new allocation percentages in percent, dollar amount and Conform to Target, if you agree click **Submit** at the bottom of the page to be provided with a confirmation number which will also be emailed to the email address on file (if you have already provided one)
- If you change your mind or need to make additional changes, click on **Back** to make any necessary changes or **Cancel** to end or restart the process

Transfer Funds - Allows you the opportunity to transfer between investments only.

Please contact Customer Service at 800-356-3009, prompt 7 for further assistance.





REBALANCE

- **Conform Ending Balances** – Allows participants to rebalance their account according to their current investment elections: Select **Make Changes**, click on **Next** then **Submit**. A confirmation number will be emailed to the email address on file (if you have already provided one)
- **Conform To Target Allocations** – Allows participants to rebalance their account according to the percentages entered by the participant: Select **Make Changes**, enter the exact current percent in the **New Target** column (total must equal to 100%), click on **Next** you will be directed to confirm that you want to update the election percentages to match your transfer target percentages, click on **Yes**, click on **Next**, then click on **Submit**. A confirmation number will be emailed to the email address on file (if you have already provided one)
- **Recurring Balance** – Allows participants to create a recurring balance transaction: Select **Make Changes**, indicate “How often you would like to rebalance?,” select a day to rebalance your portfolio, set a start date of first rebalance (the day should match the day you elected to rebalance Ex. day of rebalance 1, start date of rebalance 06/01/2016), enter threshold percent for rebalance, click on **Next**, you will be directed to the Review page then click on **Submit**. A confirmation number will be sent to the email address on file (if you have already provided one)

Please note: Exchange orders submitted before 4:00 PM EST will be traded the same day on a best efforts basis. Exchange orders submitted by fax, mail, or via internet after 4:00 PM EST will be traded the next business day. The next business day policy is guaranteed only if the mutual fund companies and clearing broker involved settle the trade by the next business day (T+1) or if less than 2,500,000,000 shares are traded on the NASDAQ exchange on the day you place your order or on the day after. If trading volume on the NASDAQ exceeds the limit or the outside parties cannot settle the trade as specified, your order will be processed on a best efforts basis and Slavic will not be responsible for the timing, only the accuracy of your trade. The above policy is still subject to the 14-day error notification policy following the mailing of your statement. To receive compensation for any trading error, you must notify Slavic in a timely fashion to allow for correction to minimize damages, if any.



CONTRIBUTION CHANGE/DEFERRAL RATE

Allows you the option to change the contribution/deferral rate you contribute to your 401k account.

Your plan may allow you to change your contribution rate to a whole percent or dollar amount. If a dollar amount selection is available, you will also have the option to change a dollar amount on the Change of Contributions Rates screen. You now have the option to change your contribution rate right from the Dashboard, select **Change Contribution Rate** or follow the steps below:

- Login to your Slavic401k.com online account
- Select **Manage** from the upper navigation
- Select **Manage Investments**
- Go to **Change of Contribution Rates** then click on **Get Started**
- Select **Edit Pre-Tax** to change or stop your contribution rate, click on **Change**, enter the new dollar amount or whole percentage then **Next**
- If your plan offers Roth, you will also have the option to change the dollar amount or percentage rate. If you do not want to make a change to the Roth source, click on **Next**
- You will be directed to the **Review** page which will display the new rate
- If you agree, click on **Submit** to be provided with the confirmation number which will be sent to the email address on file (if you have already provided one)
- If you change your mind or need to make additional changes, click on **Back** to make any necessary changes or **Cancel** to end or restart the process

Please note: Your contribution rate change may not occur immediately and will be processed to take effect during the soonest eligible payroll cycle on a best efforts basis. The 401(k) plan document defines the effective date that contribution changes may occur.





LOANS

This option allows you the opportunity to view your loan history. You will also have access to the amortization schedule for an active loan which displays the next scheduled loan payment.



ONLINE REPORTS

Your Slavic 401k and PlanRight statements will be available to be mailed or emailed on a quarterly basis. To select or change your delivery preferences simply indicate online delivery or mail and online delivery then click **Submit**.

You have the option to create a report to view your balance on any particular day, please follow the steps below:

- Go to the drop down arrow under **Select Report** and change to **Online Report**
- Change From and To Date then click on **Get Results**
- Select **Open** to view and print the **Online Report**



WITHDRAWALS

Allows you the opportunity to electronically complete the forms below:

Please ensure your mailing address is correct prior to submitting an electronic form; go to Personal Profile to update. To confirm if you qualify for a Distribution, Loan or Hardship request, please refer to the Summary Plan Description (SPD) of your particular plan. If you need a copy of the SPD, please contact The Customer Service Department at 800-356-3009.

- **Distribution/Rollover Form**-To request a distribution from your 401k account, click on **Get Started** then answer all the required fields indicated by a red asterisk
- **Loan Request Form**-To borrow from your 401k account, click on **Get Started** then answer all the required fields indicated by a red asterisk
- **Hardship Form**-With the required proof, a hardship distribution allows you the option to request the funds that you have contributed to the plan. Click on **Get Started** then answer all the required fields indicated by a red asterisk





MY PORTAL

Forms, Quarterly Statements, Retirement Calculator

You have the ability to print the following forms which can be faxed to 561-241-9442 or emailed to customers@slavic401k.com, click on **Forms** in My Portal:

- Change Form
- Rollover Into Slavic 401k and PlanRight Form
- Catch-up contribution Form
- Beneficiary Information and Change Consent Form
- Beneficiary Distribution Form
- Auto Enrollment 90 day Cancellation Form



401(K) Express Email

Slavic401k and PlanRight offer a free service to email your 401k balance to you once per week. We also provide links to online information about your 401k plan to help you better manage your investments.

To register, please go to **My Portal** from the upper navigation then scroll down to **Email Express** to subscribe.



QUARTERLY STATEMENTS

- Select **My Portal** on the upper Navigation
- Select Quarterly Statements
- Select the statement you wish to view by changing the date (ex. 06/30/2016)
- Click on **Submit**



RETIREMENT PATH CALCULATOR

This is a tool designed to help you determine how much to save for your retirement, please answer the indicated questions then click on **Calculate**.



NOTES:



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