

Auto Enrollment Opt Out

Our website provides you the convenience of opting out of auto enrollment.

STEP 1

From the Dashboard select:

- Plans
- Deferrals
- View Elections

The screenshot shows a navigation menu with the following items: Dashboard, My Forecast, Financial Wellness, Plans (highlighted), and Shortcuts (with a dropdown arrow). Below this, there is a secondary menu with Transactions, Future Elections, Deferrals (highlighted), Distributions, and Beneficiaries (with a dropdown arrow). A third menu item, View Elections (highlighted), is positioned below the Deferrals item. Contributions Summary is also visible in the menu.

STEP 2

From Savings Rate(s):

- Review Current Savings Percentage
- Under New Savings Percentage enter 0%
- Select Submit

The screenshot shows the 'Savings Rate(s)' form. The title is 'Savings Rate(s)'. Below it is the section 'SETTING SAVINGS RATE(S)' with explanatory text. The 'EMPLOYEE 401(K)' section shows the Name as 'TEST C PARTICIPANT' and SSN as 'XXX-XX-8132'. There are two input fields for percentages: 'Current Savings Percent' (set to 6%) and 'New Savings Percent' (set to 6%), both highlighted in red boxes. Below these fields is a note: 'You can save 1% to 15%. Elect 0% if you do not want to save for this source.' The 'Last changed at Recordkeeper: 07/01/2012' is also visible. The 'Current Automatic Savings Increase' section shows a status of 'Increase Annually' and a date of '07/01/2024'. There is a section for 'INCREASE SAVINGS RATE ANNUALLY' with radio buttons for 'No' and 'Yes*' (selected). A footnote states: '*If you choose to have your savings rate increased annually, it will be increased by 1% on each increase date anniversary until you reach the auto-increase maximum of 6%.' At the bottom, there are 'Clear' and 'Submit' buttons, with the 'Submit' button highlighted in a red box.