

Auto Increase Opt Out

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

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 v. Below this, there is a secondary menu with Transactions, Future Elections, Deferrals (highlighted), Distributions, and Beneficiaries v. A third menu level is visible with View Elections (highlighted) and Contributions Summary.

STEP 2

From Savings Rate(s):

- Verify your current saving percentage is correct
- Under *Current Automatic Savings Increase*, select *No* or *Yes*
- Select *Submit*

The screenshot shows the 'Savings Rate(s)' form. It includes a 'SETTING SAVINGS RATE(S)' section with explanatory text. Below that, it shows 'EMPLOYEE 401(K)' information for 'TEST C PARTICIPANT' with SSN 'XXX-XX-8132'. There are two input fields for 'Current Savings Percent' and 'New Savings Percent', both set to 6%. A note states '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 shown. Under 'Current Automatic Savings Increase', the status is 'Increase Annually'. A red box highlights the 'INCREASE SAVINGS RATE ANNUALLY:' section with radio buttons for 'No' and 'Yes*' (selected). A disclaimer at the bottom 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 right, there are 'Clear' and 'Submit' buttons, with 'Submit' highlighted in a red box.