

Retirement Plan Information Online Contribution Change

Within your account website you can make changes to your saving rate.

STEP 1

From the Dashboard select:

- *Plans*
- *Deferrals*
- *View Elections*

A screenshot of the retirement plan dashboard navigation menu. At the top right, there are links for 'Support', 'My Profile', and 'Logout'. Below these are 'Dashboard', 'My Forecast', 'Financial Wellness', 'Plans', and 'Shortcuts'. A dropdown menu is open under 'Plans', showing options: 'Balance', 'Performance', 'Investments', 'Transactions', 'Future Elections', 'Deferrals', 'Distributions', 'Beneficiaries', and 'View Elections'. The 'View Elections' option is highlighted.

STEP 2

From View Elections:

- Select *Change Contributions*

A screenshot of the 'View Elections' page. It shows a table with two rows: 'EMPLOYEE PRE TAX' and 'ROTH DEFERRAL'. The column 'Your Deferral Election Per Pay Period' shows '0%' for both. A 'Change Contributions' button is located at the bottom right.

STEP 3

From Savings Rate(s):

- Select *the source you want to change*
- Click *Submit*

A screenshot of the 'Savings Rate(s)' page. The title is 'Savings Rate(s)'. Below it is the heading 'Change Savings Rate'. The text explains that savings rate changes are submitted one source at a time and that the user is limited to a combined maximum savings amount of 100%. There are two radio button options: 'EMPLOYEE PRE TAX (0%)' and 'ROTH DEFERRAL (0%)'. At the bottom, there are 'Cancel' and 'Submit' buttons.

STEP 4

From Savings Rate(s):

- Enter *the new percentage you would like to save*
- Click *Submit*

A screenshot of the 'Savings Rate(s)' page showing the input fields. The 'Current Savings Percent' field is set to '10 %' and the 'New Savings Percent' field is also set to '10 %'. Below the fields, there is a note: 'You can save 1% to 100%. Elect 0% if you do not want to save for this source.' At the bottom, there is a timestamp: 'Last changed at Recordkeeper: 02/13/2024' and 'Cancel' and 'Submit' buttons.