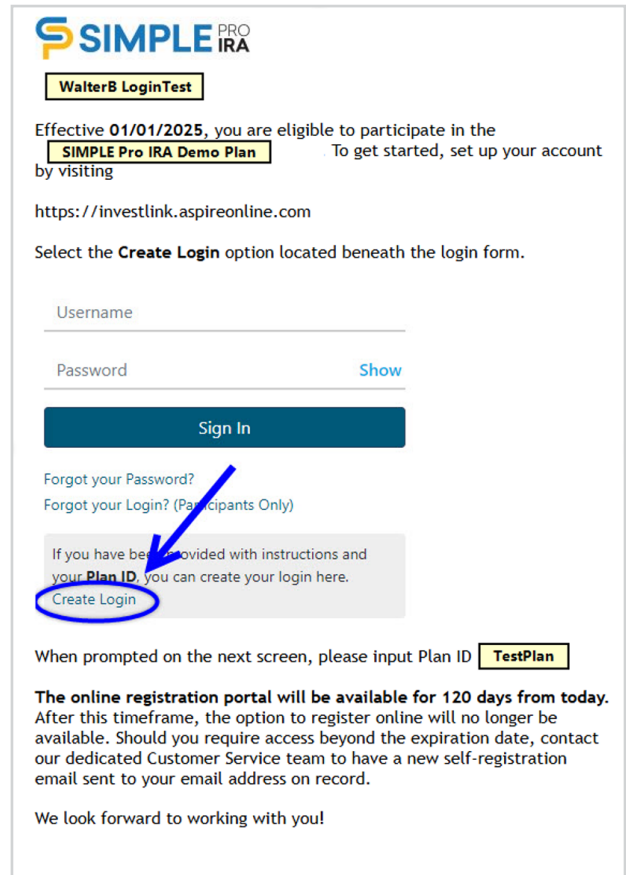


## Welcome Email

After the participant is added to the system, they will receive an email with instructions on how to access their account.

- 1 The website to login is:  
<https://investlink.aspireonline.com/Login.aspx?ReturnUrl=%2f>

Subject:  
Accessing your Retirement Account Online



**SIMPLE PRO IRA**

**WalterB LoginTest**

Effective **01/01/2025**, you are eligible to participate in the **SIMPLE Pro IRA Demo Plan**. To get started, set up your account by visiting <https://investlink.aspireonline.com>

Select the **Create Login** option located beneath the login form.

Username

Password  [Show](#)

**Sign In**

[Forgot your Password?](#)

[Forgot your Login? \(Participants Only\)](#)

If you have been provided with instructions and your **Plan ID**, you can create your login here.

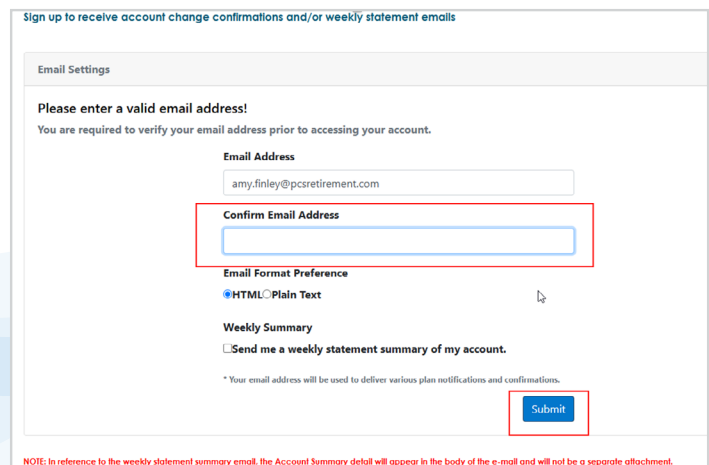
**Create Login**

When prompted on the next screen, please input Plan ID **TestPlan**

**The online registration portal will be available for 120 days from today.** After this timeframe, the option to register online will no longer be available. Should you require access beyond the expiration date, contact our dedicated Customer Service team to have a new self-registration email sent to your email address on record.

We look forward to working with you!

- 2 The first time they log in, they are prompted to verify their email address.



Sign up to receive account change confirmations and/or weekly statement emails

**Email Settings**

**Please enter a valid email address!**  
You are required to verify your email address prior to accessing your account.

**Email Address**

**Confirm Email Address**

**Email Format Preference**  
☒ HTML ☐ Plain Text

**Weekly Summary**  
☐ Send me a weekly statement summary of my account.

\* Your email address will be used to deliver various plan notifications and confirmations.

**Submit**

NOTE: In reference to the weekly statement summary email, the Account Summary detail will appear in the body of the e-mail and will not be a separate attachment.

- 3 The participant will receive an email titled "Participant Email Confirmation." They click the link where they will be prompted to login again.

Dear WalterB LoginTest,

You have chosen to receive email notifications for your account in the SIMPLE Pro IRA Demo Plan.

Click on the link below to confirm your email address.

The verification link expires 24 hours from the date/time you requested to confirm your email address. After 24 hours you will need to log in and request another email confirmation.

<https://investlink.aspireonline.com/EmailConfirmation.aspx?pgld=584358&key=gdinwjPG0NpJVxm9>

You will be required to login to confirm your email address.

- 4 The first time they log in, they are prompted to verify their email address.

#### Two Factor Authentication Verify Code

Please insert the last code we have sent to you.

If you did not receive the verification code, then click the Resend button to go back to the send code page to resend a new verification code.

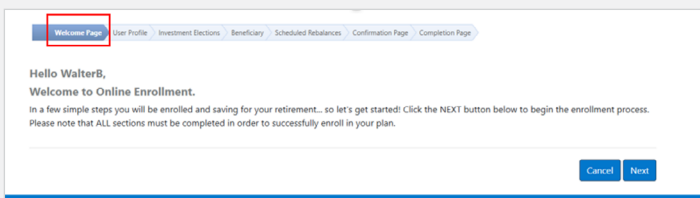
Depending on the mobile service provider or the email provider, SMS text messages or emails may take some time to reach your device. If you receive code via email option, please check your spam/junk folder.

If the entered code is invalid or expired, you will be required to send a new code. There are limits on the number of attempt you are allowed before required to re-enter your credentials again.

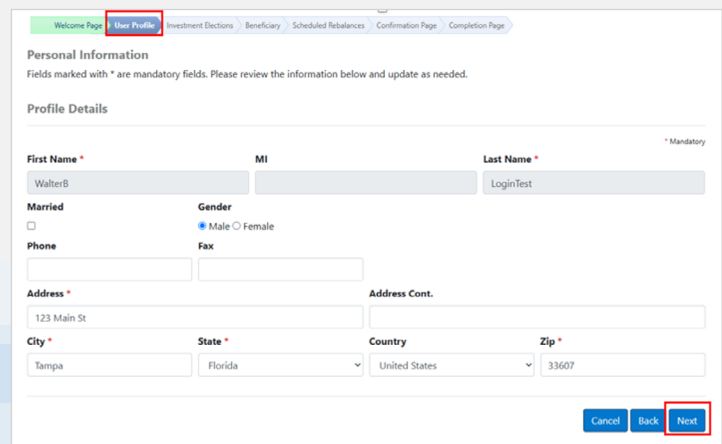
## Completing Online Enrollment

The participant will then be prompted to complete their enrollment.

1



2



3

Welcome Page > User Profile > **Investment Elections** > Beneficiary > Scheduled Rebalances > Confirmation Page > Completion Page

### Investment Elections

Before investing in any investment option, be sure to read the prospectus and additional information regarding the investment option. To access this information, click on the investment option name. By electing to invest in any investment options, you are acknowledging that you have read the prospectus and related information.

#### Change Investment Election

**Create Your Own Asset Allocation**

Keep current elections CANCEL BACK **Change elections**

4

Welcome Page > User Profile > **Investment Elections** > Beneficiary > Scheduled Rebalances > Confirmation Page > Completion Page

### Investment Elections

Before investing in any investment option, be sure to read the prospectus and additional information regarding the investment option. To access this information, click on the investment option name. By electing to invest in any investment options, you are acknowledging that you have read the prospectus and related information.

#### Create Your Own Asset Allocation

Filter...

Fund	Ticker	Current Elections (%)	New Elections (%)
Alerian MLP ETF	AMLP	25.00	0.00
DFA International Small Cap Value	DISVX	25.00	0.00
Fidelity Equity-Income	FEQIX	25.00	0.00
DFA Two-Year Global Fixed-Income	DFGFX	15.00	0.00

5

Welcome Page > User Profile > Investment Elections > **Beneficiary** > Scheduled Rebalances > Confirmation Page > Completion Page

### Beneficiary Information

Once you have entered an initial beneficiary, an Add Beneficiary button will appear in the event you want to add additional beneficiaries. The first beneficiary will default to the Primary beneficiary. This can be changed once you add another Beneficiary. NOTE - If you add or update any information here, please contact your PLAN SPONSOR to update the same information in their records.

#### Beneficiary Details

**Primary \*** Mandatory

☒ Yes ☐ No

**First Name \*** MI Last Name \*

Amy Finley

**Gender** Relationship \*

☒ Male ☐ Female ☒ Yes ☐ No spouse

**Email** Phone Fax

amy.finley@aspireonline.com 8138740671

**Address** Address Cont.

4010 W Boy Scout Blvd., Suite 450

**City** State Country Zip

Tampa Florida United States 33607

**Allocation**

100 %

☒ I acknowledge that this electronic designation, election or signature has the legal force and effect of my handwritten signature. I understand and acknowledge that I am making the legal designation of my beneficiaries. I understand that until I submit this information, it will not be accepted or received.

Save Cancel

6

Welcome Page > User Profile > Investment Elections > **Beneficiary** > Scheduled Rebalances > Confirmation Page > Completion Page

### Beneficiary Information

Once you have entered an initial beneficiary, an Add Beneficiary button will appear in the event you want to add additional beneficiaries. The first beneficiary will default to the Primary beneficiary. This can be changed once you add another Beneficiary. NOTE - If you add or update any information here, please contact your PLAN SPONSOR to update the same information in their records.

**Add Beneficiary**

Primary	First Name	Last Name	Relationship	Allocation(%)	Action
<input checked="" type="checkbox"/>	Amy	Finley	spouse	100	Delete Edit

☐ I acknowledge that this electronic designation, election or signature has the legal force and effect of my handwritten signature. I understand and acknowledge that I am making the legal designation of my beneficiaries. I understand that until I submit this information, it will not be accepted or received.

I CHOOSE NOT TO ENTER BENEFICIARIES AT THIS TIME Cancel Back **Next**

7

Welcome Page > User Profile > Investment Elections > Beneficiary > **Scheduled Rebalances** > Confirmation Page > Completion Page

### Scheduled Rebalance

If you would like to rebalance your account at a set frequency, please select one of the options from the Drop-Down menu below. NOTE: Your account is rebalanced based on your investment elections at the time of rebalance. If you are 100% invested in a model, then the model will be rebalanced based on a frequency determined at the Plan level and will not be rebalanced based on any election selected below. NOTE: Some investment options may impose a redemption fee for the redemption or exchange of shares. Rebalancing or other trading of your existing balances may trigger these fees which will be deducted from your account balance. Please be sure to read the prospectuses for the investment options in your account for information regarding redemption fees that may apply and to consider this when deciding how often to have your account rebalanced.

#### Rebalance my account

Select Frequency

Select Frequency

Annually

Quarterly

Semi-Annually

AT A SET FREQUENCY Cancel Back **Next**

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8

Welcome Page > User Profile > Investment Elections > Beneficiary > Scheduled Rebalances > **Confirmation Page** > Completion Page

**Enrollment Details**  
By clicking "SUBMIT MY ENROLLMENT INFORMATION" you acknowledge and approve your Employer to reduce your compensation by the selected amount and approve that amount to be contributed as an elective deferral and/or Roth contribution (if permitted) in the investment elections selected. Any Employer contributions on your behalf will also be invested according to the investment elections selected during the enrollment process. You must complete all sections to finish your Online Enrollment.


**Profile Details [ Edit ]**

Name	State	Phone
WalterB LoginTest	FL	

**Investment Elections [ Edit ]**

Fund Name	Current Election (%)
Alarian MLP ETF	100.00

Current Election



100%  
Alarian MLP ETF

Primary	Name	Relationship	Allocation (%)
<input type="checkbox"/>	Amy Finley	spouse	100.00

**Scheduled Rebalances [ Edit ]**  
Elected not to rebalance account

[Cancel](#) [Back](#) [SUBMIT MY ENROLLMENT INFORMATION](#)

9

Welcome Page > User Profile > Investment Elections > Beneficiary > Scheduled Rebalances > Confirmation Page > **Completion Page**

**Enrollment Process Completed**  
Congratulations, you are now enrolled!!

Congratulations! You have successfully completed the online enrollment process. [Click here](#) to access your account.

## Participant Web Navigation

The rest of this guide will go over the various menu options on the website.

1

The Account Overview section is what the participant will see first. They can click on each tab to view more details.

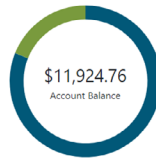
Welcome, WalterB LoginTest > My Profile > Log Out  
Last login: Monday, April 8, 2024 4:44 PM  
Current balance: \$11,924.76 as of Friday, May 23, 2025  
SIMPLE PRO IRA DEMO PLAN (TESTPLAN)

Home > **Overview** > Services > Investments > Job Queue

The Account Overview page displays your current holdings and most recent transactions

Overview | Balances | Sources | Allocations | Personal Rate Of Return

Here's a snapshot of your account. Get more detail by selecting from tabs or dropdown menus in each section. Or, scroll through the quicklinks above to access commonly requested information or functions.



\$11,924.76  
Account Balance  
Current Holdings

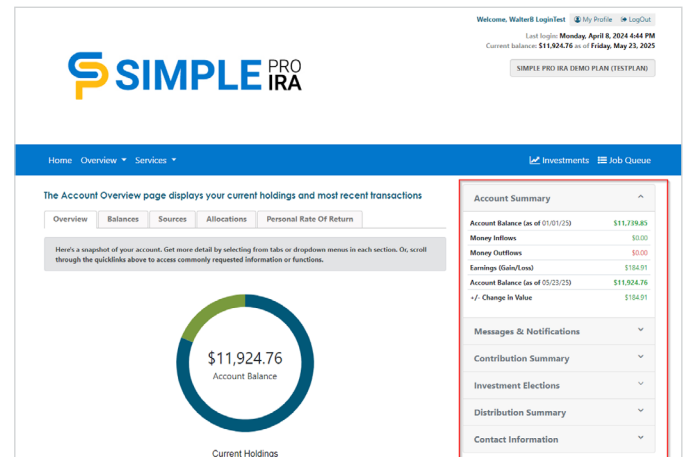
**Account Summary**

Account Balance (as of 01/01/23)	\$11,739.85
Money Inflows	\$0.00
Money Outflows	\$0.00
Earnings (Gain/Loss)	\$184.91
Account Balance (as of 05/23/25)	\$11,924.76
+/- Change in Value	\$184.91

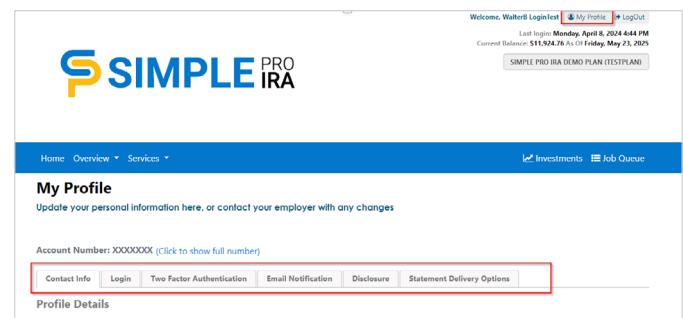
**Messages & Notifications**

- Contribution Summary
- Investment Elections
- Distribution Summary
- Contact Information

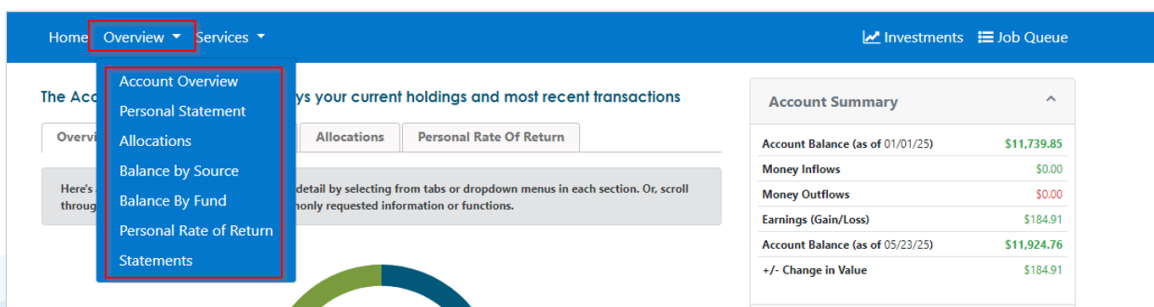
- On the right-hand side of the page, there is the Quick view of the account. The participant can click to expand each section for a summary.



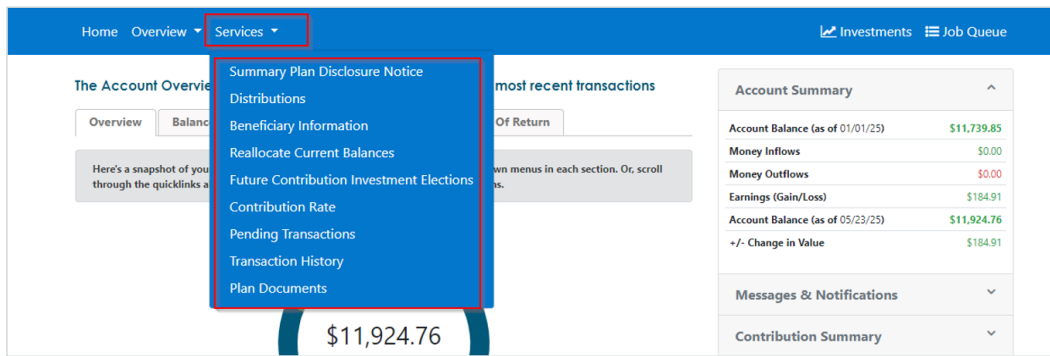
- The “My Profile” section at the top right is where the participant can update contact information, make changes to their login information, update two factor authentication, update their email preferences (*opt in or out of certain email alerts*), view any applicable disclosures, and update their statement delivery options.



- The overview menu option at the top will provide the same information as the Account Overview that the participant sees upon login as well as additional information. The top menu has the option of viewing balances by source or fund, view their personal statement or run statements on demand for any period they wish.



- 5 The “Services” menu option is where the participant can submit Distributions, View beneficiary information, Reallocate Current Balances, View/Edit Future Contribution Investment Elections, View/Change Contribution Rate, see Pending Transactions, view Transaction History, and view any Plan Documents.



## 6 Reallocate Current Balances

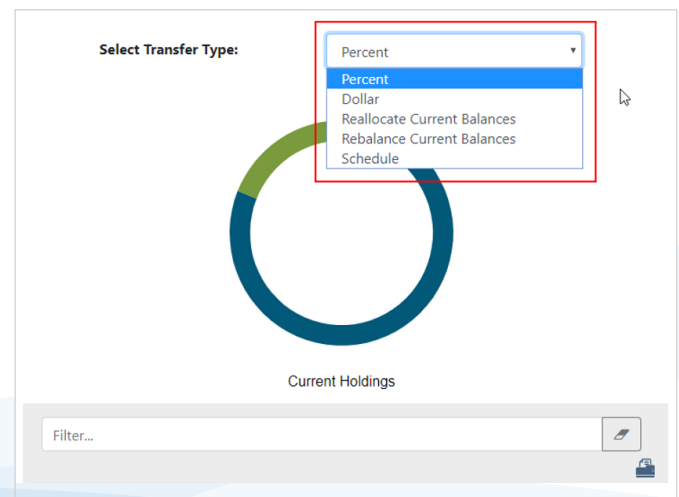
**Reallocate Current Balances: Percent** allows you to transfer your existing balance from one or more investment(s) into any other available investment choices.

- Enter the new fund(s) and percentages in column two (must total 100%)
- Click **SUBMIT** to review your Holdings After Transfer

**NOTE:** The changes you make here may affect future deposits. Please review the Confirmation Page for all account updates before clicking Confirm. Go to Services > Future Contribution Investment Elections to change how future deposits are invested.

- 7 This screen defaults to Percent, but the participant has the option to submit other types of transfers

- **Dollar specific** – Transfer current holdings by dollar amount
- **Reallocate current balances** – This shows the current holdings and the percentage they make of the total balance.
- **Rebalance current balances** – To match future allocations.
- **Schedule** – Set up a scheduled transfer or rebalance Annually, Monthly, Quarterly or Semi-annually.



## 8 Future Contribution Investment Elections

- You have the option to change or view the elections

### Future Contribution Investment Elections

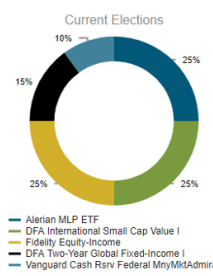
Investment Election

☒ Change Investment Elections  
☐ View Current Elections

NEXT

### Future Contribution Investment Elections

Current Elections



Fund	Ticker	Elections (%)
<a href="#">Alerian MLP ETF</a>	AMLP	25.00
<a href="#">DFA International Small Cap Value I</a>	DISVX	25.00
<a href="#">Fidelity Equity-Income</a>	FEQIX	25.00
<a href="#">DFA Two-Year Global Fixed-Income I</a>	DFGFX	15.00
<a href="#">Vanguard Cash Rsrvt Federal MnyMktAdmiral</a>	VMRXX	10.00

### Create Your Own Asset Allocation

Filter...

Fund	Ticker	Current Elections (%)	New Elections (%)
<a href="#">Alerian MLP ETF</a>	AMLP	25.00	<input type="text" value="0.00"/>
<a href="#">DFA International Small Cap Value I</a>	DISVX	25.00	<input type="text" value="0.00"/>
<a href="#">Fidelity Equity-Income</a>	FEQIX	25.00	<input type="text" value="0.00"/>
<a href="#">DFA Two-Year Global Fixed-Income I</a>	DFGFX	15.00	<input type="text" value="0.00"/>
<a href="#">Vanguard Cash Rsrvt Federal MnyMktAdmiral</a>	VMRXX	10.00	<input type="text" value="0.00"/>
<a href="#">Fidelity Contrafund</a>	FCNTX	0.00	<input type="text" value="0.00"/>
<a href="#">Fidelity Freedom Income</a>	FFFX	0.00	<input type="text" value="0.00"/>

9 Contribution Rate – this is where the participant can change their salary deferral percentage.

*\*Roth will only show if the plan allows for Roth.*

Contribution Details

Save

Year	Max Employee Before Tax and Roth Contributions Amount	Max Catch-up Before Tax and Roth Amount
2025	\$16,500	\$3,500

Contribution Source	Minimum Contribution %	Maximum Contribution %	Current Election	New Contribution % Per Pay Period	New Contribution \$ Per Pay Period
Before Tax	0 %	100 %	0%	0.00	0.00
Roth	0 %	100 %	0%	0.00	0.00
Totals				0.00	0.00

PLEASE NOTE: Total New Contribution % must be greater than or equal to 0 % and cannot exceed 100%

10 Pending Transactions

Review transactions that have not yet been posted to your account

Transactions Awaiting Approval have yet to be approved by your plan administrator.

Pending Transactions have been approved by your plan administrator, if applicable, and are awaiting processing.

Transactions Awaiting Approval

Pending Transactions

No pending transactions found

11 Transaction History

Start Date1/1/2025

End Date5/27/2025

Transaction CategoryAll Categories

Sort/View ByCategory

Fund or ModelAll Funds/Models

Source of MoneyAll Sources

StatusPosted

Search

12 Plan Documents

Instructional and informational materials, forms, and documents may be available to you in the Document Library.

Document(s)

Group

Plan Docs

Document Description	File Name
Test Document	Test document.pdf

1 items in 1 pages



The last two main menu items are **Investments** and **Job Queue**

Home Overview Services

Investments Job Queue

## 13 Clicking **Investments** takes you to the Investment Dashboard with four options

### Investment Dashboard

Performance Prices Financial Services Fund/Model Fact Sheet

Select an option to display!

**1. Investment Dashboard Performance**  
This page allows you to review investment performance statistics for Last Quarter End

From the below tabs, choose whether you wish to see performance for all investments available in your plan, or just those in your account. You can search for a specific investment by fund description or ticker.

Performance Prices Financial Services Fund/Model Fact Sheet

**LAST QUARTER AVERAGE TOTAL RETURNS**  
\* Indicates Index/Benchmark Performance

Funds Models

View All Investments View My Investments

Filter by description, fund id or ticker

Fund ID	Fund Description	Ticker	Portfolio	Expense Ratio	Quarter	YTD	1 Yr	3 Yrs	5 Yrs	10 Yrs	ITD	As Of
AMLP	Abercrombie MLP ETF	AMLP		0.850	9.82%	9.82%	18.41%	19.90%	35.86%	3.87%	5.33%	03/31/2023
F00000Q48	* Morningstar MLP Composite TR USD	BMARK		0.000	N/A	N/A	22.89%	22.73%	40.61%	4.74%	N/A	03/31/2023
DSVX	DFA International Small Cap Value	DSVX		0.430	10.35%	10.35%	13.04%	9.04%	17.35%	6.52%	7.33%	03/31/2023

**2. Investment Dashboard Prices**  
Per share calculations are based on prices determined at the end of the business day and are subject to change without notice

Performance Prices Financial Services Fund/Model Fact Sheet

**FUND PRICES AS OF 05/23/2023**

Filter by fund id, description or ticker.

**Total Number of Funds 15**

Fund ID	Fund Description	Ticker
FCNTX	Fidelity Contrafund	FCNTX
FEQIX	Fidelity Equity-Income	FEQIX

**3. Investment Dashboard Financial Services**  
This page allows you to research your plan's investment options using Morningstar's® tools

Click on **Quick** below **Prospectus** or **Summary** information to access the Summary Prospectus or Investment Fact Sheet, respectively, on the Morningstar® website

Performance Prices Financial Services Fund/Model Fact Sheet

Filter by fund id, description or ticker.

**Total number of Funds 11**

Fund ID	Fund Description	Ticker	Prospectus	Summary Information
FCNTX	Fidelity Contrafund	FCNTX	Open	Open
FEQIX	Fidelity Equity-Income	FEQIX	Open	Open
FFRAX	Fidelity Freedom Income	FFRAX	Open	Open

**4. Investment Dashboard Fund/Model Fact Sheet**

Performance Prices Financial Services Fund/Model Fact Sheet

Funds Models

Filter by fund id, description or ticker.

**Total Number of Fund(s) 15**

Fund ID	Description	Ticker	Begin Date	End date
AMLP	Abercrombie MLP ETF	AMLP	06/29/2016	
DSVX	DFA International Small Cap Value	DSVX	12/03/2014	
DFGFX	DFA Two-Year Global Fixed-Income	DFGFX	12/03/2014	

## 14 **Job Queue** – this is where the participant can view reports generated such as the on-demand statements.options

Home Overview Services Investments Job Queue

**Total Jobs 2**

Status	Job ID	Description	Date	Time
Running...	8417882	Regular Statement	05/27/2023	01:13 PM
1 Report	8417762	Summary Plan Disclosure Notice	05/27/2023	11:35 AM

Page size: 10 2 items in 1 pages

- Account Summary
- Messages & Notifications
- Contribution Summary
- Investment Elections
- Distribution Summary