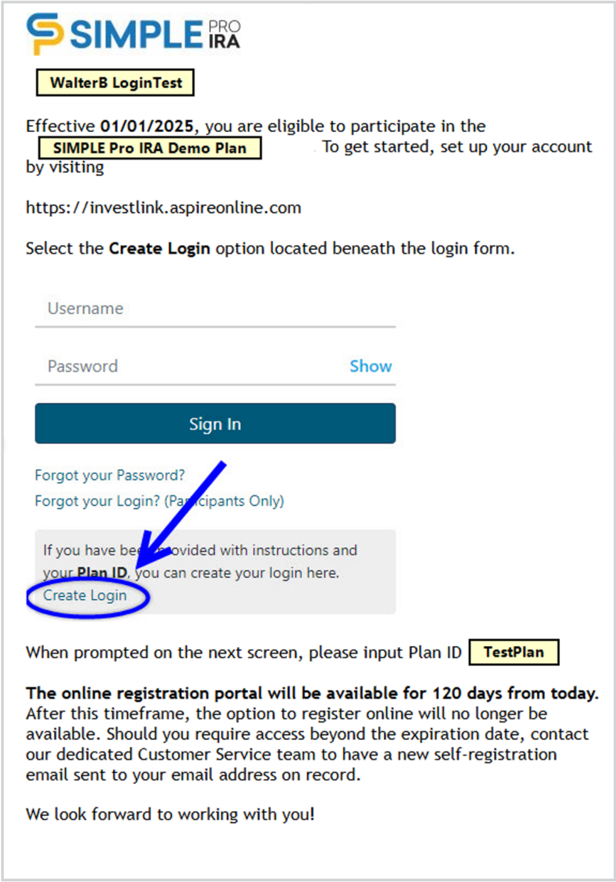
Welcome Email

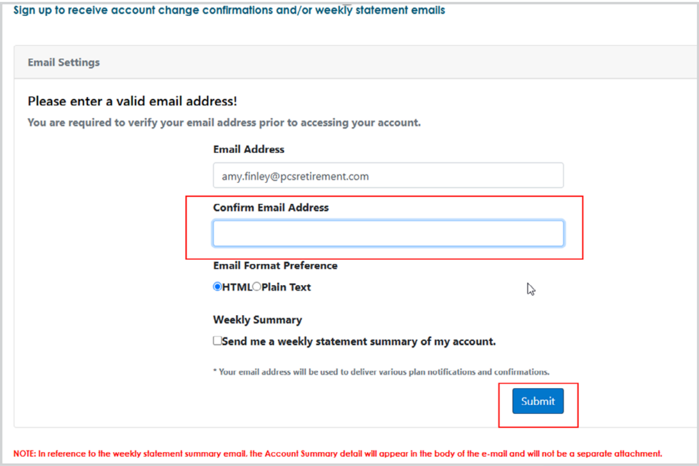
After the participant is added to the system, they will receive an email with instructions on how to access their account.

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

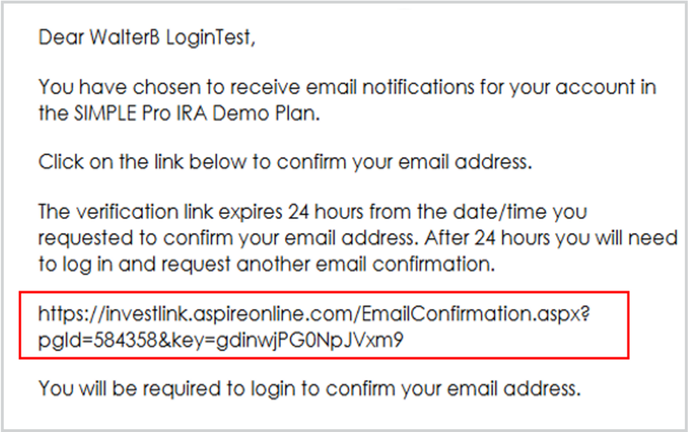
   Subject:
   Accessing your Retirement Account Online



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



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.

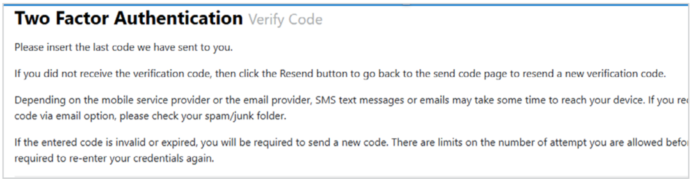
Click on the link below to confirm your email address.

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?pgId=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.

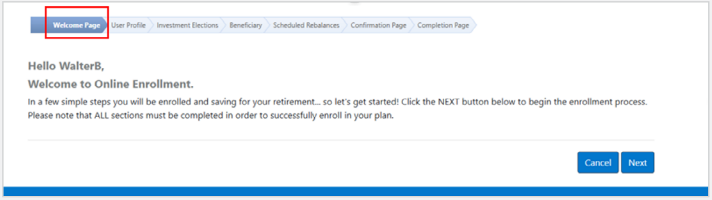
Depending on the mobile service provider or the email provider, SMS text messages or emails may take some time to reach your device. If you re[...] code via email option, please check your spam/junk folder.

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 befo[...] required to re-enter your credentials again.

Completing Online Enrollment

The participant will then be prompted to complete their enrollment.

1



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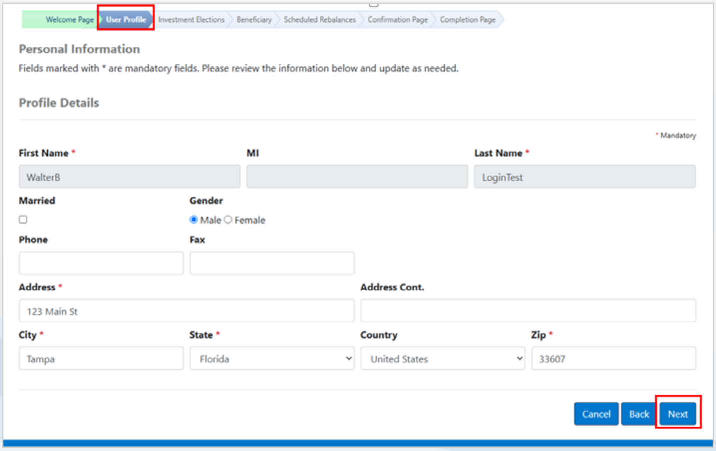
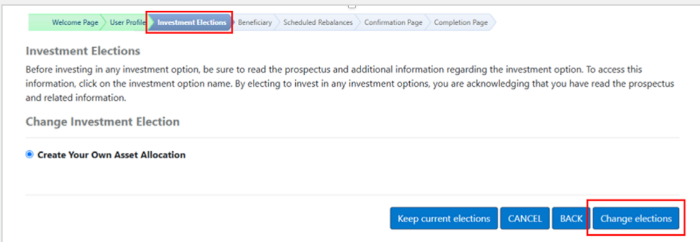
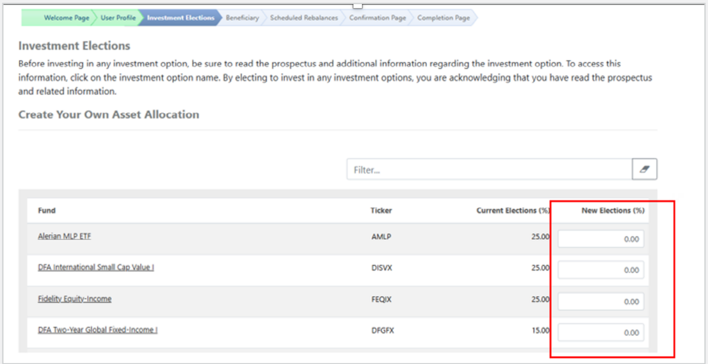


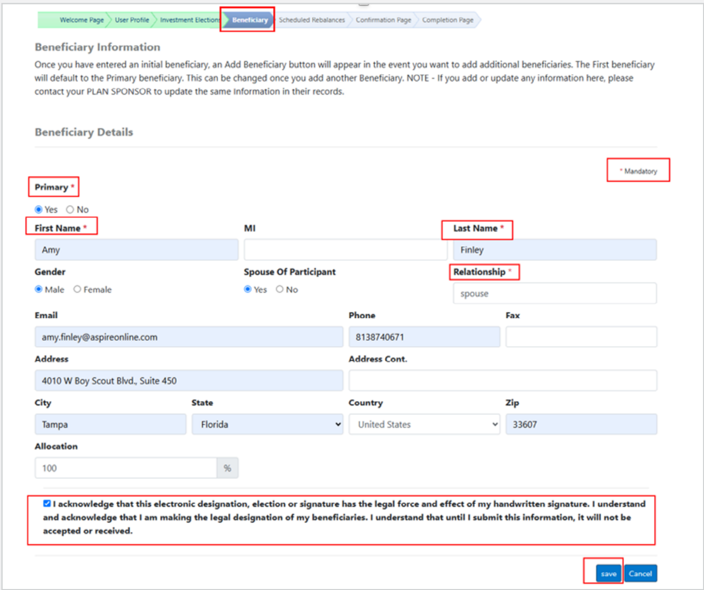
3


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

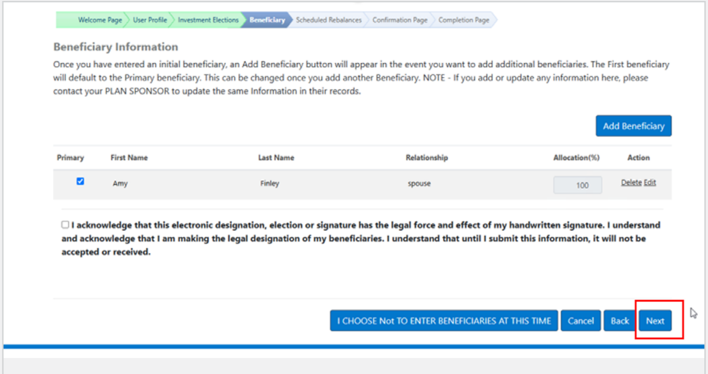
4


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 I
DISVX
25.00
0.00
Fidelity Equity-Income
FEQIX
25.00
0.00
DFA Two-Year Global Fixed-Income I
DFGFX
15.00
0.00

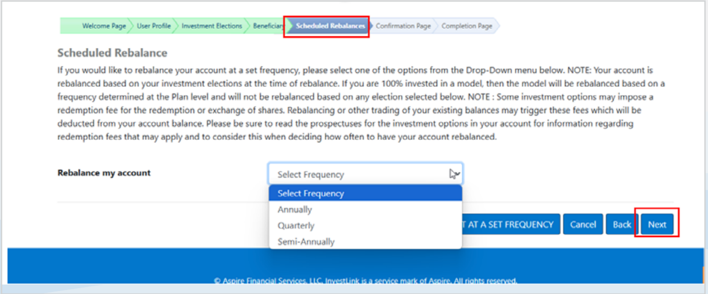
5


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
* Mandatory
Primary *
Yes
No
First Name *
MI
Last Name *
Amy
Finley
Gender
Male
Female
Spouse Of Participant
Yes
No
Relationship *
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
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
T AT A SET FREQUENCY
Cancel
Back
Next
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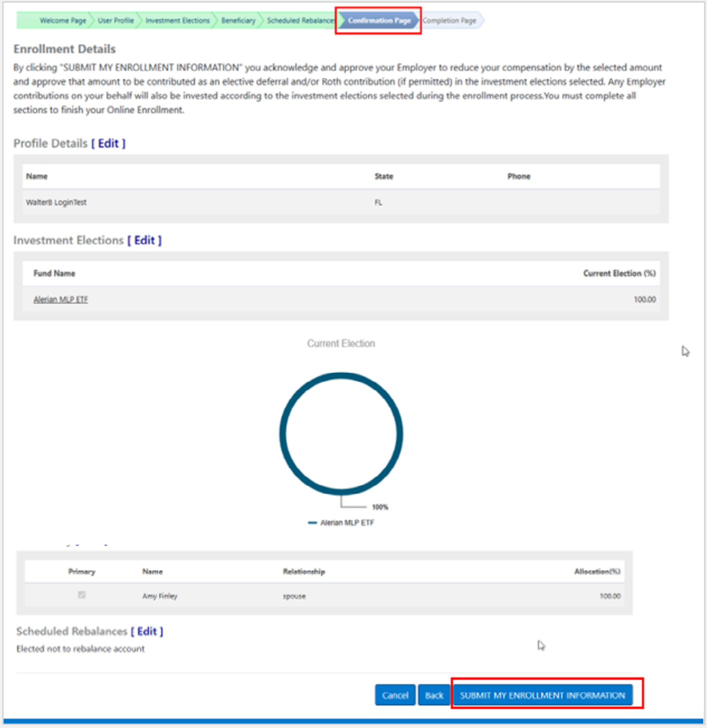
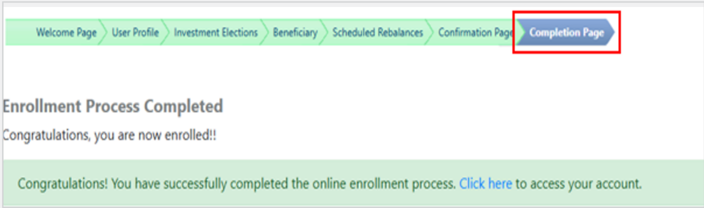
8



9

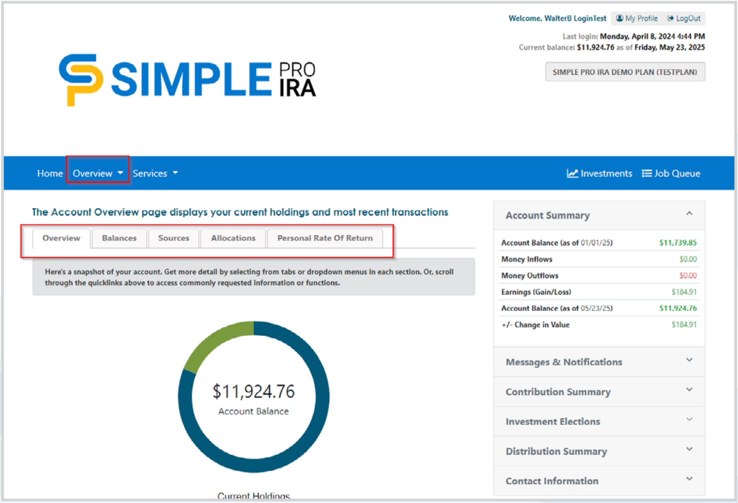


Participant Web Navigation

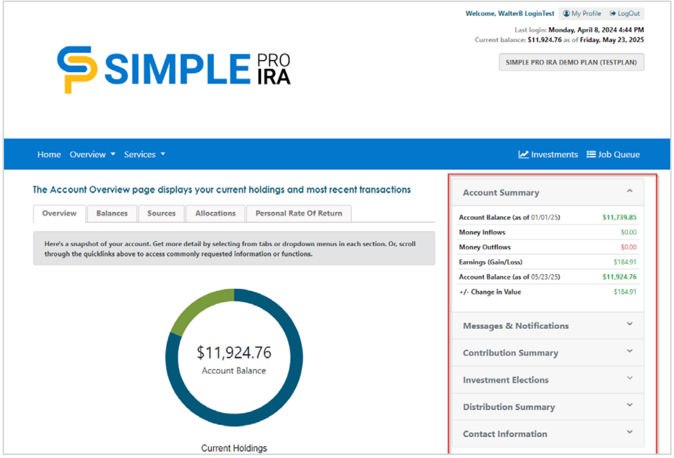
The rest of this guide will go over the various menu options on the website.

1

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



2 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.



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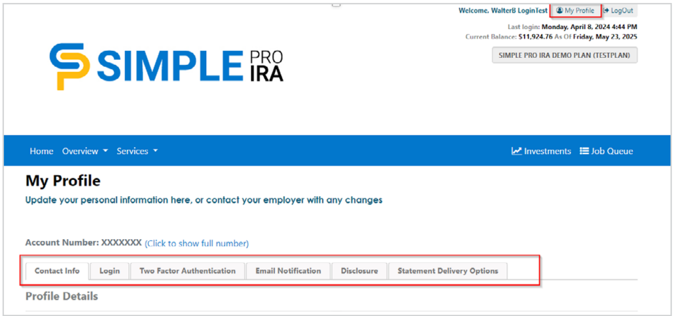
3 The “My Profile” section at the top right is where the participant can update contact information, make changes to their login information, update two factor authentication, update their email preferences *(opt in or out of certain email alerts)*, view any applicable disclosures, and update their statement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



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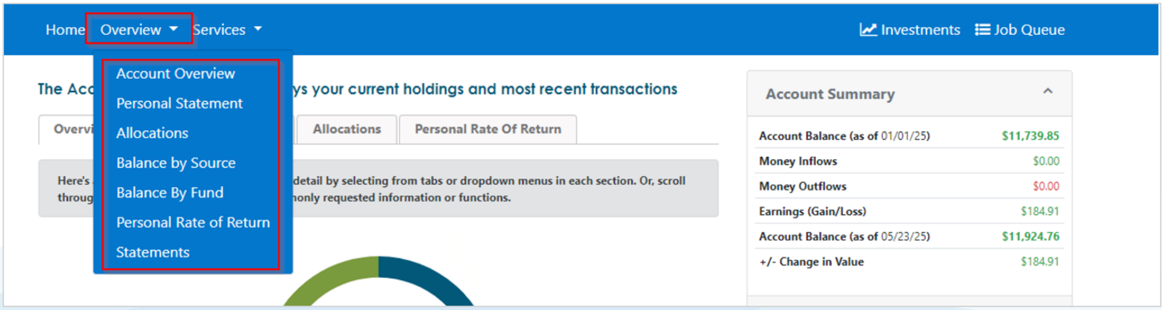
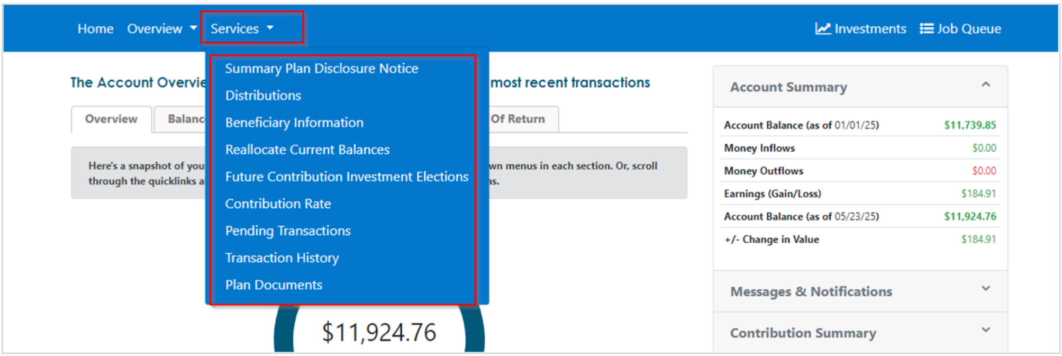
4 The overview menu option at the top will provide the same information as the Account Overview that the participant sees upon login as well as additional information. The top menu has the option of viewing balances by source or fund, view their personal statement or run statements on demand for any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

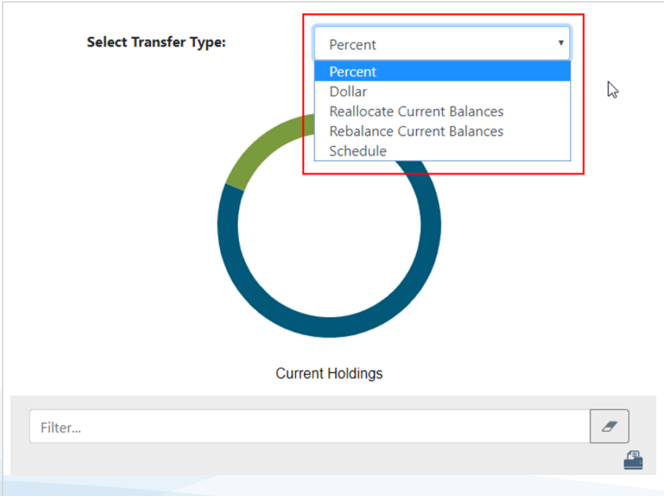
Reallocate Current Balances: Percent allows you to transfer your existing balance from one or more investment(s) into any other available investment choices.

- 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

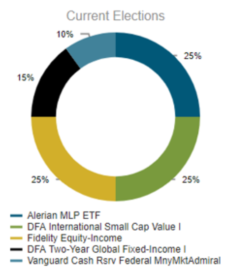
Investment Election

- (•) Change Investment Elections
- ( ) View Current Elections

NEXT

Future Contribution Investment Elections

Current Elections



Fund	Ticker	Elections (%)
Alerian MLP ETF	AMLP	25.00
DFA International Small Cap Value I	DISVX	25.00
Fidelity Equity-Income	FEQIX	25.00
DFA Two-Year Global Fixed-Income I	DFGFX	15.00
Vanguard Cash Rsrv Federal MnyMktAdmiral	VMRXX	10.00

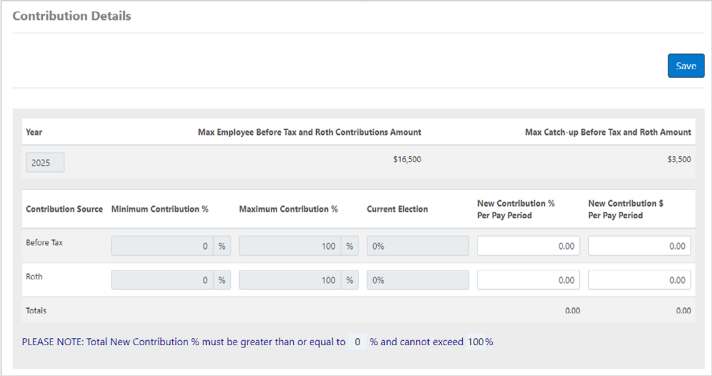
Create Your Own Asset Allocation

Filter...

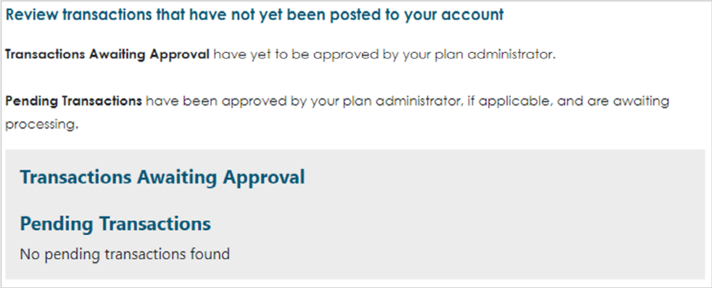
Fund	Ticker	Current Elections (%)	New Elections (%)
Alerian MLP ETF	AMLP	25.00	0.00
DFA International Small Cap Value I	DISVX	25.00	0.00
Fidelity Equity-Income	FEQIX	25.00	0.00
DFA Two-Year Global Fixed-Income I	DFGFX	15.00	0.00
Vanguard Cash Rsrv Federal MnyMktAdmiral	VMRXX	10.00	0.00
Fidelity Contrafund	FCNTX	0.00	0.00
Fidelity Freedom Income	FFFAX	0.00	0.00

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

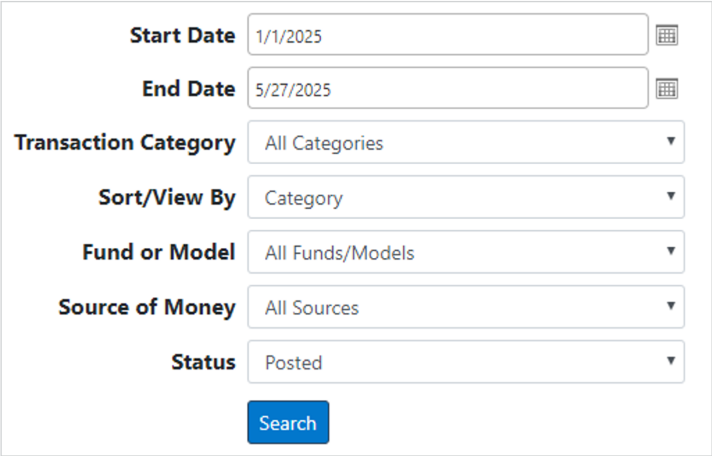
**Roth will only show if the plan allows for Roth.*



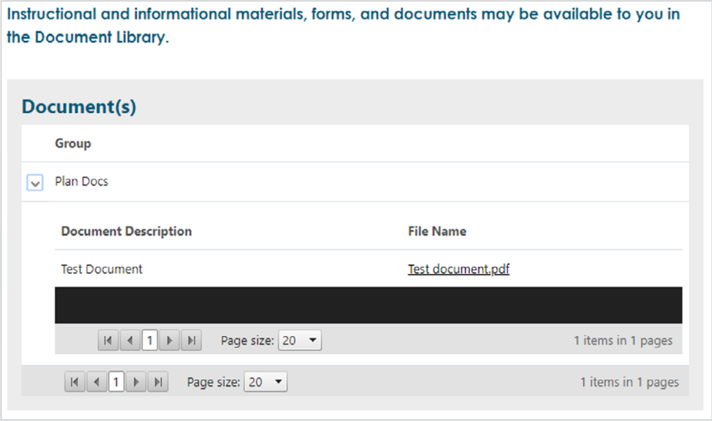
10 Pending Transactions



11 Transaction History

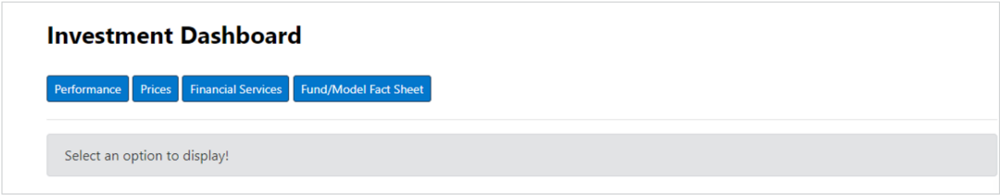


12 Plan Documents

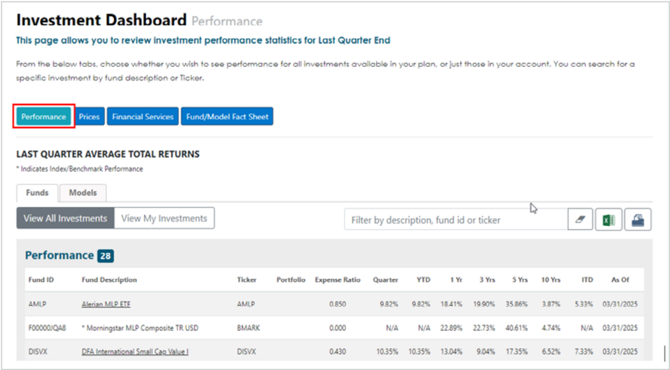


The last two main menu items are **Investments** and **Job Queue**

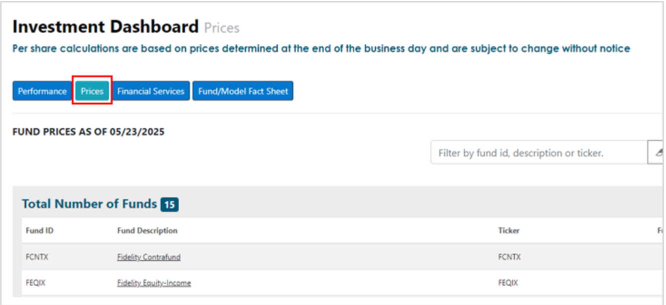
13 Clicking **Investments** takes you to the Investment Dashboard with four options



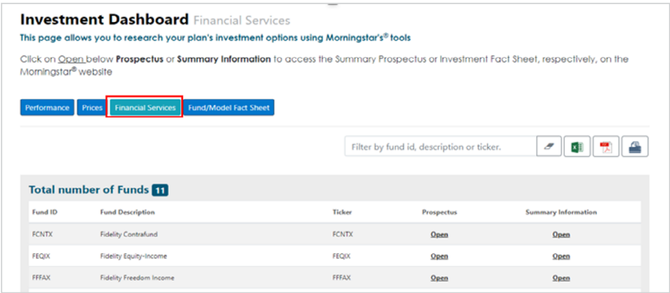
1.



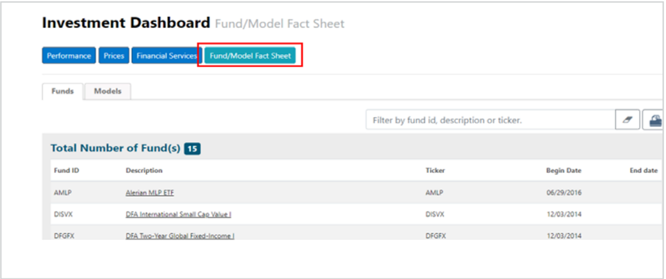
2.



3.



4.



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