

On the website, PLEASE be sure to scroll to the TOP of the page after continuing on to the next page EACH time. Some screens don't appear to have anything for you to do unless you scroll to the top



HOME

ACCOUNTS

TRANSACTIONS

PLANNING

INVESTMENTS

SITE MAP

Current Confidence Number®

Take the Challenge

### Account Dashboard

ACCEND SERVICES INC 401(K) P/S PLAN

#### BALANCE

As of 12/19/2016

**\$0.00**

Daily Change

\$0.00 0.0%

#### ACCOUNT INFORMATION

Investments

Asset Allocation

Contribution Elections

You must register an account on the T.Rowe Price website first, then use this guide



## Take the Confidence Number® Challenge.



You know there are few things as important as your financial future, so take a couple of minutes out of your day to see if you're on track. Not where you want to be? That's okay, you're not alone. We're here with simple steps to help you close the gap.

Take the Challenge

STATEMENTS & DOCUMENTS

[view details](#)



Take the  
Challenge



1. Getting Started



2. My Contributions



3. My Investment Choices



4. About Me



5. Summary

Welcome to ACCEND SERVICES INC 401(K) P/S PLAN, Laurel!



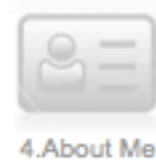
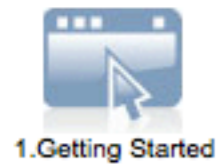
Enroll in ACCEND SERVICES INC  
401(K) P/S PLAN

- Consider how much you should save for retirement
- Choose your investments
- Use our Tools to help evaluate your situation

Yours will say **Begin**

[Update Enrollment](#)

[Download a Prospectus](#)



### How much do you want to contribute each pay period?

- i** Enter the amount/percentage of each paycheck you wish to contribute.
- i** The total sum of Pre-Tax and Roth contributions must be less than or equal to the plan's maximum percentage (100.00%) values.

Before tax contributions come out of your paycheck before income taxes are taken out, making your taxable income lower. You don't pay taxes on these earnings into you withdraw them.

Roth contributions offer another way to save for retirement and are made with money that has already been taxed. If you take a qualified distribution, you will not have to pay taxes on those funds.

#### Plan Contributions

\$  %  Min: 0.00% Max: 100.00%

**Pre-Tax** What is this?



Pre-tax comes out of your check before tax

**Roth** What is this?



Roth comes out of your check after tax

Total Percent: 5.00%

You can do either one or a combination of both

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Continue to My Investment Choices



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1

Tell us how you would like to invest.

2

Select your investments.

3

Verify Investments

This page will default to select the target based plan based off your birth date, but you can choose whatever plan or combinations of plans you want. More information about the plans can be found under the Investments tab

Now, allocate your money into your new investments. For more information regarding your investment options, including prospectuses and fund fact sheets, go to the "investments" tab above.

Apply to: **All Employer Contribution and Employee Contribution** ▾

You need to invest:

**100%**

You've invested:

**100.00%**

Print Table

Investments	Asset Class	Current Balance	Current Shares	Current Allocations	New Allocations
American Funds American Balanced R6 Ticker: RLBGX	Blended Assets	\$0.00	0.000	0.00 %	<input type="text" value="0.00%"/>
American Funds EuroPacific Growth R6 Ticker: RERGX	Stocks	\$0.00	0.000	0.00 %	<input type="text" value="0.00%"/>
American Funds New Perspective R6 Ticker: RNPGX	Stocks	\$0.00	0.000	0.00 %	<input type="text" value="0.00%"/>
American Funds Washington Mutual R6	Stocks	\$0.00	0.000	0.00 %	<input type="text" value="0.00%"/>





Ticker	Funds	Value	Balance	Percentage	Selection
T. Rowe Price Retirement 2025 Ticker: TRRBX	Retirement Funds	\$0.00	0.000	0.00 %	<input type="checkbox"/> 0.00%
T. Rowe Price Retirement 2030 Ticker: TRRHX	Retirement Funds	\$0.00	0.000	0.00 %	<input type="checkbox"/> 0.00%
T. Rowe Price Retirement 2035 Ticker: TRRCX	Retirement Funds	\$0.00	0.000	100.00 %	<input checked="" type="checkbox"/> 100%
T. Rowe Price Retirement 2040 Ticker: TRRDY	Retirement Funds	\$0.00	0.000	0.00 %	<input type="checkbox"/> 0.00%
T. Rowe Price Retirement 2045 Ticker: TRRKX	Retirement Funds	\$0.00	0.000	0.00 %	<input type="checkbox"/> 0.00%
T. Rowe Price Retirement 2050 Ticker: TRRMX	Retirement Funds	\$0.00	0.000	0.00 %	<input type="checkbox"/> 0.00%
T. Rowe Price Retirement 2055 Ticker: TRRNX	Retirement Funds	\$0.00	0.000	0.00 %	<input type="checkbox"/> 0.00%
T. Rowe Price Retirement 2060 Ticker: TRRLX	Retirement Funds	\$0.00	0.000	0.00 %	<input type="checkbox"/> 0.00%
T. Rowe Price Retirement Balanced Ticker: TRRIX	Retirement Funds	\$0.00	0.000	0.00 %	<input type="checkbox"/> 0.00%
T. Rowe Price Stable Value	Money Market/Stable Value	\$0.00	0.000	0.00 %	<input type="checkbox"/> 0.00%
Victory Sycamore Established Val I Ticker: VEVIX	Stocks	\$0.00	0.000	0.00 %	<input type="checkbox"/> 0.00%

The selection looks like this

Investment Elections will only affect how future contributions are posted to your account and will not affect existing fund balances if any. If you would like to re-allocate any current portfolio balances you must place an exchange.

Please select "**Continue**" to change your Investment Election.

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**1** Tell us how you would like to invest.



**2** Select your investments.



**3** Verify Investments

## Rebalance My Portfolio

Would you like to set up automatic rebalancing for your portfolio? Note: If applicable, existing balances will be included in any Automatic Rebalance.

Yes  No

How often would you like to rebalance?

Annually

Pre-Selected Date: 12/31/2016

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Continue

Selecting yes will allow them to automatically rebalance your portfolio for you, selecting no means you would review and rebalance your own portfolio



### What is Automatic Rebalance

Automatic rebalance functionality provides you with the ability to realign the holdings within your portfolio on a periodic basis to maintain your desired asset allocation.



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Tell us how you would like to invest.



Select your investments.



Verify Investments

### Here's your investment selection

Action: Future Investment Elections

Affecting: Current Balances & Future Contributions

New Investments: T. Rowe Price Retirement 2035 100.00%

Ticker: TRRJX

Total: 100.00%

Auto Rebalancing: Annually

Next Rebalance Date: 12/31/2016

Accept the terms and conditions to continue

I accept these Terms and Conditions.

Terms and Conditions:

I agree that this is a suitable investment for me.





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1

Confirm that your information is correct.

2

Who would you like to name as your beneficiary?

### Personal Information

Name: Laurel Davis  
Date of Birth:   
Date of Hire:   
Marital Status:

Your Info

### Address

#### Mailing Address

Your Info

To make changes, you must contact your employer.

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Skip About Me

Continue





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1 Confirm that  
your information  
is correct.

2 Who would you  
like to name as  
your  
beneficiary?

If you are married you must designate your spouse as your sole primary beneficiary with an allocation of 100%. If you are married and want to designate a non-spouse beneficiary or allocate less than 100% to your spouse, you must submit a **Beneficiary Designation/Change Form**, to your employer, even if you enter information on this website. The marital status on file with your employer will be used to determine your plan beneficiary. Please be sure to provide your marital status and any changes in your marital status to your employer.

Please confirm or update your marital status before adding primary beneficiary information.

Marital Status:

Confirm

Update

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Skip Add Beneficiaries

Continue

Select your marital status, then click "Update" - then you will be allowed to click "Continue"





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You're just about finished! Please review your choices, and then click **Complete Enrollment**.

About Me



Personal Information

Address

Beneficiaries | Make Changes

Name: Laurel Davis

Mailing Address:

There is no beneficiary information.

Date Of Birth:

Your Info

Your Info

Date Of Hire:

Marital Status:

laurel.davis@accendservices.com

My Contributions | Make Changes

Pre-Tax: 5.00%

Roth: 0.00%

My Investments | Make Changes

Apply To: All Employer Contribution and Employee Contribution

Investments: T. Rowe Price Retirement 2035 100.00%

Total: 100%

Auto Rebalance: YES

Double check your information then click Complete Enrollment down at the bottom right (off the screen in this shot)



Congratulations, Laurel. You're now enrolled in ACCEND SERVICES INC 401(K) P/S PLAN!

You will be eligible for...

Salary Reduction: 12/26/2016

Discretionary: 01/01/2017

Matching: 01/01/2017

Roth Elective Deferral: 12/26/2016

Continue to Home Page

This shows other services you may be eligible for, NOT what you have just enrolled for - Roth Elective Deferral is different than the Roth choice you had earlier.

My Contributions | Make Changes

Pre-Tax:	5.00%
Roth:	0.00%

My Investments | Make Changes

Apply To:	All Employer Contribution and Employee Contribution	
Investments:	T. Rowe Price Retirement 2035	100.00%
	<b>Total:</b>	<b>100%</b>
Auto Rebalance:	YES	
Frequency:	Annually	
Next Rebalance Date:	12/31/2016	

You can see this is correctly enrolled in the Pre-tax choice that was made

