

# 401 (K) Retirement Savings Registration Instructions



**After 90 days of employment, all Gebruder Weiss Employees are automatically defaulted to a 3 % savings rate.**

Log into Ascensus account to opt out of 401(K) deductions and switch savings rate to 0% or to switch your rate.

Please see “401 K Changing Rate” Document for Instructions.

## How to Get Started!

1. Go to [www.ascensus.com](http://www.ascensus.com)
2. Click on “Log In” in top right corner of home page
3. Log in to “Employee Log in”

---

### Retirement Plan Services

401(k) and other qualified plans

-  [Employee log in](#)  **Click Here**
-  [Employer log in](#)
-  [Financial professional log in](#)
-  [TPA log in](#)

### IRAs and HSAs for Financial Institutions

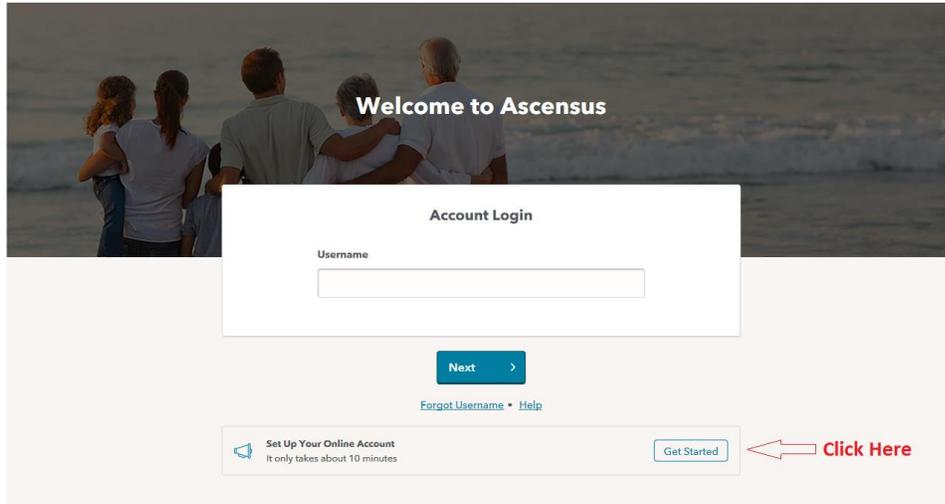
 [IRAdirect® and eResource Center™ log in](#)

[File Transfer Site](#)

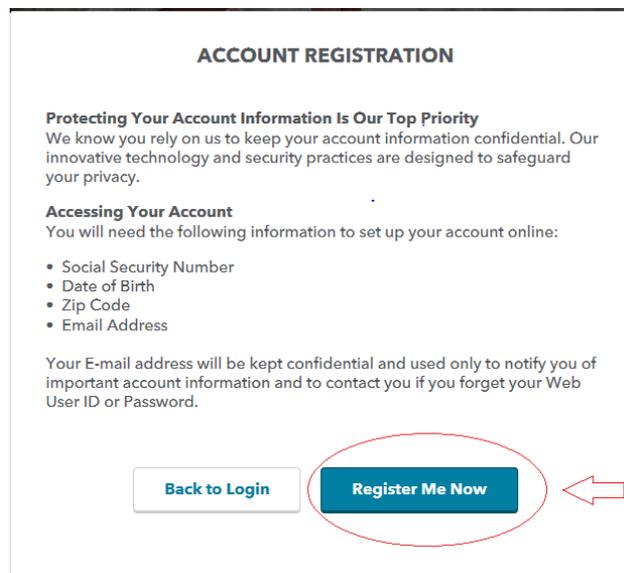
To send or retrieve files through the RPS Commercial Software Support desk.

## First Time Logging in?

4. Click on “Get Started”



5. Select “Register me now”



6. Complete Account Registration using the following information (Be sure to follow the format (per instructions))

1. Social Security Number
2. Date of Birth
3. Zip Code

**Important: The electronic version of this document found on the GW SharePoint is official. All printed versions are uncontrolled copies.**

**ACCOUNT REGISTRATION**

To protect your account details, please verify your personal information below. Next, you will:

- Create a Web User ID
- Enter your email address
- Select a security image and phrase

Depending on your plan's setup, you will then either create a password or have a system-generated password emailed to you.

**Social Security #**  
Format: xxx-xx-xxxx

**Date of Birth**  
Format: mm/dd/yyyy

**Zip Code**  
Format: first 5 digits

Click Continue when all information is entered.

7. Create a web user ID

You will use this ID and password to log in each time

You will need to create the following:

- ➔ Username
- ➔ Security Question
- ➔ Password
- ➔ Security Image
- ➔ Security Phrase
- ➔ Email

Click Submit when done with all questions

**Account Registration**  
**WEB USER ID**

Create a Web User ID for future access to this website. Your Web User ID must have:

1. 8-25 characters
2. Letters and numbers only
3. At least one letter

Create Web User ID

Confirm Web User ID

Set up a security question and answer to be used if you ever need to retrieve your Web User ID and/or password.

Security question

Answer the question

**EMAIL ADDRESS**

Enter your email address.

Email Address

Confirm Email Address

8. Click “Start Enrollment”

## Enrollment

Welcome to your company's retirement plan. In a few simple steps, you will be on your way to saving for a comfortable retirement. After you enroll, you will have access to a wealth of resources that will make managing your account easy.

Enrollment Requirement	Status
1. Plan Highlights	Not Complete
2. Set your savings rate	Not Complete
3. Select your investments	Not Complete
4. Complete your beneficiary designation	Not Complete
5. Confirmation	Not Complete

Start Enrollment



Click Here to Continue

### Next screen will explain the Plan Highlights

- Eligibility
- Contributions
- Vesting
- Withdrawals
- Loans
- Acknowledgement

**At the bottom of the page, you must acknowledge (By clicking on Continue Enrollment) that you have read and understand the Plan Highlights.**

## Acknowledgement

The above highlights provide only a brief overview of the Plan's features and are not legally binding. A more detailed Summary Plan Description will be given to you. Please read it carefully and contact your Plan Administrator if you have any further questions. A complete description can also be found in the legal Plan Document that governs the Plan. This document is available for your review. If there are any differences between the information presented and the actual provisions of the Plan as reflected in the Plan Document, the Plan Document will govern.

By clicking the Continue Enrollment button below, I acknowledge that I have read and understand the Plan Highlights.

Cancel

Continue Enrollment



Click Here to Acknowledge Plan

**The enrollment screen will appear again- click “Continue Enrollment”**

**Important: The electronic version of this document found on the GW SharePoint is official. All printed versions are uncontrolled copies.**

Saving's Rate Screen will appear. This is the savings rate that is taken from each pay check. The default will be at 3% per company policy.

## Savings Rate(s)

### Change Savings Rate

Our records indicate you have not selected a savings rate and you were enrolled automatically into the plan. If you do not make any changes you will continue to participate in the plan with a savings rate of 3% .

Listed below are the sources for which you may change your savings rate. Savings rate changes are submitted one source at a time. However, you must use the same deduction type (either dollars or percent) for all sources.

You are limited to a combined maximum savings amount of 100% of your compensation in addition to source level savings limits.

EMPLOYEE 401(K) (Defaulted to 3%)  
EMPLOYEE ROTH 401(K) DEFERRAL (0%)



9. This is just an information page--> Click continue

10. On the next saving's rate page, you can keep your rate at 3% and click continue  
**OR**  
Change your rate where it says "New Percent/ Amount"

## Savings Rate(s)

### SETTING SAVINGS RATE(S)

The EMPLOYEE 401(K) amount or percentage displayed below is what is currently held on file. This is the amount or percentage of your salary that is deducted per paycheck on a pre-tax basis and invested into your account. The amount withheld is also called your contribution.

Past changes to your savings rate may not be reflected in this value. If you wish to change your savings rate, please enter your change in the appropriate field below. Use only whole numbers, no decimals, dollar (\$) or percent (%) signs. Dollar savings rate can be made in increments of \$1.

#### EMPLOYEE 401(K)

**Name:** \_\_\_\_\_  
**SSN:** \_\_\_\_\_  
**Deduction Type:**  %  \$

**Current Savings Percent/Amount**  **New Percent/Amount**  

You can save 1% to 100%.  
Elect 0% if you do not want to save for this source.

**Last changed at Recordkeeper:**  
  

**Important: The electronic version of this document found on the GW SharePoint if official. All printed versions are uncontrolled copies.**

You will then receive a “Savings rate” confirmation Page. Click “Continue Enrollment”

## Savings Rate(s)

### Confirmation

Your instruction has been accepted.

- Based on your instruction your savings rate for EMPLOYEE 401(K) is 3 %.

**Note:** If you instructed a change in savings rate, the effective date depends on your employer's payroll process.

Check [here](#) if you wish to select another source for savings rate change

Continue Enrollment

11. You will be directed back to the enrollment page--> click on “Continue Enrollment”

- You will be prompted to select your investments
- Company default is the “**Moderate Model**”

12. If you want to keep Moderate Model please hit “Leave as is”

**OR**

If you want to elect your own investments --> click on “Make Changes”

## Contribution Elections

### Default Investments

Because you didn't make investment selections previously, any contributions submitted have been deposited into your plan's default investment, as listed below. For your future savings, you may choose to leave as is or make changes.

Click “Change” to elect other investment options.

INVESTMENT	PERCENT
MODERATE MODEL	100%
<b>Total</b>	<b>100%</b>

Option 1



Leave as is

Make Changes



Option 2

When finished, you will get the “confirmation of investment selections” Page. Print this page for your record.

**Important: The electronic version of this document found on the GW SharePoint is official. All printed versions are uncontrolled copies.**

# Confirmation of Investment Selections

The investment changes you requested have been made.

CONFIRMATION #	DATE OF CHANGE
005415037	01/05/2018

Click “Continue Enrollment” to move on.

The enrollment screen will appear again- click “Continue Enrollment”

## Beneficiary Designation

- 13. Option 1- You may designate your retirement plan beneficiaries  
→ Click --> Designate Beneficiaries

OR

you may continue by clicking “Continue Enrollment”

## Beneficiary Designation

Use the following link to designate one or more beneficiaries of your retirement account. To complete the process, you will need Adobe Reader, which you can download for free below.

### Complete Your Beneficiary Designation

[Designate Your Beneficiaries](#) ← Option 1

**Please Note:**

If you are married and wish to designate someone other than your spouse as your primary beneficiary, you will need your spouse's consent. For spousal consent, you must print the form provided in the "Consent of Spouse" portion of the beneficiary designation process and complete it in the presence of a notary or plan representative.

To continue your enrollment, click the acknowledgement box below.

I have completed my beneficiary designation or will complete it at a later time.

[Cancel](#) [Continue Enrollment](#) ← Skip Beneficiaries

The enrollment screen will appear again- click “Continue Enrollment”

The confirmation page will appear. You may print this page for your records.  
To continue press “Continue Enrollment”

**Important: The electronic version of this document found on the GW SharePoint is official. All printed versions are uncontrolled copies.**

## Confirmation

Please review the items below to confirm the choices you have selected as part of the enrollment process. If you would like to make any changes please click the Cancel button below to return to the Enrollment page and select the option you would like to change.

### Savings Rate(s) Selected

SOURCE	DEFERRAL PERCENT
EMPLOYEE 401(K)	3%

### Investments Selected

#### ALL CONTRIBUTION SOURCES

FUND / SECURITY NAME	ELECTION PERCENT
MODERATE MODEL	100%
Total	100%

Please [print](#) this confirmation page for your records.

Cancel

Continue Enrollment



The enrollment page will pop up.  
Status should be **“Completed”** for each enrollment requirement.

14. Click “Access My Account” to finish your registration.

## Enrollment

Welcome to your company’s retirement plan. In a few simple steps, you will be on your way to saving for a comfortable retirement. After you enroll, you will have access to a wealth of resources that will make managing your account easy.

Enrollment Requirement	Status
1. Plan Highlights	Completed <a href="#">Review</a>
2. Set your savings rate	Completed <a href="#">Review</a>
3. Select your investments	Completed <a href="#">Review</a>
4. Complete your beneficiary designation	Completed <a href="#">Review</a>
5. Confirmation	Completed <a href="#">Review</a>

Access My Account



Congratulations on taking an important first step in saving for your retirement. You have enrolled successfully and can now take this time to explore the various sections of the website and the tools that will make managing your account easy.

**You will then be directed to the home page and may access your account at any time.**

**Important: The electronic version of this document found on the GW SharePoint if official. All printed versions are uncontrolled copies.**