

The screenshot shows the WIPFLI login interface. At the top left is the WIPFLI logo. The main content area is a dark grey box with the following elements: a 'Welcome' header with a language selector 'English / Español', a 'Username *' field, a 'Password *' field, a 'Forgot User ID or Password?' link, a 'Participant' dropdown menu, a 'Remember me on this device' checkbox, and a yellow 'LOGIN' button. Two callout boxes with red arrows point to the fields: one for the Username field stating 'Default Username is your Social Security Number with no hyphens' and one for the Password field stating 'Default Password is the last 4 digits of your Social Security Number'. At the bottom of the page, there is a footer with contact information: 'For assistance, please call Wipfli Benefit Plan Services at 866-565-6600 or send an email to retirement@wipfli.com. | Problems viewing the site?'.

ENROLLMENT

- Progress through each screen on your own.

The screenshot shows the 'Enrollment steps' page in the WIPFLI system. The top navigation bar includes 'Dashboard', 'Performance', 'Forms & Reports', 'Financial Resource Center', and 'Plan Selection'. The main heading is 'Enrollment steps' with a 'Print' icon. Below the heading, it shows 'Overall Progress: 0% Complete'. A note states: 'Items marked with an asterisk (*) must be completed before you can proceed to the next step.' The enrollment steps are listed as: '> Your Personal Information', '> Email', and '> Security Question'. At the bottom right, there are two buttons: 'RESET' and 'NEXT'.

COMPLETE PERSONAL INFORMATION

- Your Personal Information
- Email
- Security Question

Enrollment steps Print

Overall Progress: **0% Complete**

Items marked with an asterisk (*) must be completed before you can proceed to the next step.

▼ Your Personal Information

First name Last name

Street address 1 Street address 2

City State Zip code Country

Other phone

> Email

> Security Question

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DESIGNATE YOUR BENEFICIARIES

- You must add at least one primary beneficiary.

Designate Your Beneficiaries Print

Overall Progress: **33% Complete**

This designation can have important tax and legal effects: you may wish to consult your tax advisor before continuing.

PLEASE NOTE - if you are married and wish to designate someone other than your spouse as your primary beneficiary, please complete a paper beneficiary form, which can be found on the 'Forms & Reports' tab, under the Forms section. Please refer to the Beneficiary Instructions below for further information.

Beneficiary Designation 1

Items marked with asterisk (*) must be completed before you can proceed to the next step.

Beneficiary type Beneficiary percentage

Name Relationship Birth date Social security number (optional)

Street address 1 Street address 2

City State Zip code Country

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COMPLETE INVESTMENT ELECTIONS

Select Investments Print

Overall Progress: **50% Complete**

The investment elections you enter below will be applied to all sources of contributions (including any employer contributions). Please note that once you have completed the enrollment process, you can always change your investment elections. For more information, please contact your plan administrator once you have completed the enrollment process.

I elect to invest all future contributions (including employee and employer contributions) as follows.

Rules and Criteria

Minimum allocation: 1.00%
 Minimum allocation increment: 1.00%
 Days to complete request: 1

All Sources

Investment		Current Elections	New Elections
Aggressive Portfolio	details	0.00%	<input type="text" value="0.00 %"/>
Conservative Portfolio	details	0.00%	<input type="text" value="0.00 %"/>
Moderate Aggressive Portfolio	details	0.00%	<input type="text" value="0.00 %"/>
Moderate Portfolio	details	0.00%	<input type="text" value="0.00 %"/>
DFA Emerging Markets Social Core		0.00%	<input type="text" value="0.00 %"/>
DFA US Social Core Equity 2		0.00%	<input type="text" value="0.00 %"/>
PIMCO Total Return III Instl		0.00%	<input type="text" value="0.00 %"/>
Vanguard Federal Money Market Fund		0.00%	<input type="text" value="0.00 %"/>
DFA International Social Core Equity		0.00%	<input type="text" value="0.00 %"/>
TOTAL		0.00%	0.00%

CONFIRMATION

- Review and confirm that all information is correct. When ready, select "Submit".

Enrollment steps Print

Overall Progress: **66% Complete**

Review and Confirm all of your Entries (you must click the "Submit" button below to complete the enrollment process)

If your enrollment information is correct, click below to submit your enrollment request.

Personal Information Edit

Username: _____

Street address 1: _____

Street address 2: _____

City: _____ Other phone: _____

State: _____

Zip code: _____

Country: _____ Office email address: _____

Send email confirmation to: _____

I wish to receive my participant statements electronically at the email address specified above No Yes

Beneficiary Designations Edit

Primary Beneficiary

Name	Thomas Jones	City	
Beneficiary percentage	100.00%	State	
Relationship	Spouse	Zip code	
Birth date		Country	
Home Address		Social security number (optional)	XXX-XX-
Street address 1			
Street address 2			

Investment Elections Edit

All future contributions to the plan will be invested as follows:

Moderate Portfolio : 100.00%

If your enrollment information is correct, click below to submit your enrollment request.

SUBMIT

For assistance, please call Wipfli Benefit Plan Services at 866-565-6600, or send an email to retirement@wipfli.com. | [Problems viewing the site?](#)

YOUR ENROLLMENT IS COMPLETE

- Your enrollment is complete. Please select "Continue".

Enrollment steps Print

Overall Progress: **100% Complete**