
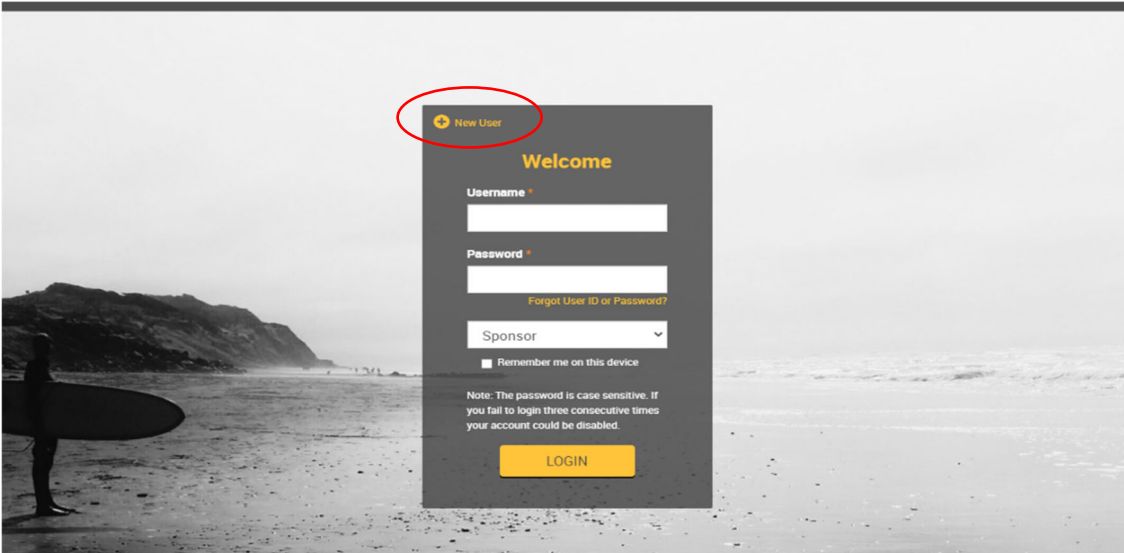


## Online Enrollment Guide


- Navigate to <https://www.yourbenefitaccount.net/cpretirement/>
- Select the 'New User' button and enter your personal information as prompted



401k@creativeplanning.com  
1.866.427.4015



- Click on each of the arrows to review and complete your Personal Information, Email, Username Information, and Security Question.

Enrollment steps  Print


---

Overall Progress: **0% Complete**

- > Your Personal Information
- > Email
- > Username Information
- > Security Question



RESET NEXT

- You will be prompted to leave the site and navigate to the iJoin Enrollment Experience.

 **CREATIVE PLANNING**  
TPA, LLC


401k@creativeplanning.com  
1-866-427-4015

Good Morning, Steve Doe  
Last Login: August 8, 2023 2:30 PM EST

[Dashboard](#) [Beneficiaries](#) [Performance](#) [Forms & Reports](#) [Contact Us](#) [EE Search](#)

## New Employee Enrollment



### iJoin Goal-Based Retirement Income

☒ You will be taken to iJoin's personalized enrollment experience for a goal-based approach to creating your saving strategy.

[BACK](#) [RESET](#) [NEXT](#)

- After the Welcome and Introductory Video, complete the 'Your Personal Info' and 'Your Income & Savings' pages.

#### Your Personal Info

Please confirm or update your personal information.

First Name

Steve

Last Name

Doe

Date of Birth

June 15, 1992

What is your current marital status?

Single

State of Residency\*

Wisconsin

Personal Email

testemail@testemail.com

Cell Phone

(715) 843-8353

[BACK](#) [CONTINUE](#)

#### Your Income & Savings

Please include information that will help us personalize your retirement picture.

Confirm or Update Annual Salary

\$50,000.00

Where do you plan to live in retirement?

Alaska

Do you have a balance in any savings accounts outside of this plan, such as a bank account, IRA or 401(k)?

No ☐ Yes ☒

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- The next two screens allow you to utilize the iJoin Retirement Income Calculator.
- This is an optional part of the enrollment experience, as the calculator can be accessed at any time after your initial enrollment.
- Please note, any contribution rates entered into the calculator are for modeling purposes only and will not impact any contributions you have established for The OPC 403(b) Plan.

Your Retirement Snapshot 🇺🇸

Steve, your current investment election is displayed below.

This investment election and your current contribution rate is projected to provide the following income at retirement age. In the next step you can modify other factors to see how they impact your projection.

Your Investment Election

[Fidelity® Small Cap Value Index](#)

**Estimated Return: 10.0%**

This is an estimate of long term portfolio growth generated using forecasting data for your actual fund selections or similar fund selections. This is only an estimate and is not a guaranteed indicator of future portfolio performance.

CHANGE INVESTMENT

Your Projected Retirement Income

Needed at age 67:  
**\$3,688/mo.**

Current estimate:  
**\$1,911/mo.**  
(not guaranteed)

Current Contribution Rates

0%	0%
Pre-Tax	Post-Tax (Roth)

Monthly Income Sources

<div style="background-color: #0056b3; color: white; text-align: center; padding: 5px; margin-bottom: 5px;">Social Security \$1,911</div> <div style="background-color: #ff9900; color: white; text-align: center; padding: 5px; margin-bottom: 5px;">This Plan \$0</div>	<div style="background-color: #0070c0; color: white; text-align: center; padding: 5px; margin-bottom: 5px;">Outside Savings \$0</div> <div style="background-color: #800000; color: white; text-align: center; padding: 5px; margin-bottom: 5px;">Shortfall <b>\$1,777</b></div>
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CONTINUE

Improve Your Path To Success

Your Projected Retirement Income

Needed at age 67:  
**\$3,688/mo.**

Strategy estimate:

Monthly Income Sources

--	--

**52%**  
of goal

Quick

**Increase**

Pre-Tax:

Post-Tax (Roth):

Contribution Type

**\$0** estimated to current

Phone: (866) 427-4015    Email: 401k@creativeplanning.com

**IMPORTANT:** If you intend to make personal info, investment election or beneficiary changes you must authorize these changes in a subsequent step in order for them to take effect in your plan.

☒ I understand rate changes are for modeling purposes only

OK

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- Your final decision will be to elect at least one (1) primary beneficiary.
- You can also add contingent beneficiaries on this screen.
- Be sure to provide the required details for each beneficiary elected.

## Beneficiaries

Please name up to 4 primary beneficiaries and up to 5 contingent beneficiaries.

Contingent beneficiaries only receive benefits if the funds cannot be allocated to a primary beneficiary.

Primary Beneficiaries	(1 Required)
<input type="button" value="➕ ADD PRIMARY BENEFICIARY"/>	
<input type="button" value="➕ ADD PRIMARY BENEFICIARY"/>	
<input type="button" value="➕ ADD PRIMARY BENEFICIARY"/>	
<input type="button" value="➕ ADD PRIMARY BENEFICIARY"/>	
<b>Total: 0%</b>	
Contingent Beneficiaries	(0 Required)
<input type="button" value="➕ ADD CONTINGENT BENEFICIARY"/>	

## Add Primary Beneficiary

### Required Details

First Name	Last Name
	Required
Relationship	
Spouse	
<a href="#">Designating someone other than your spouse? Click here for important information.</a>	
Allocation Percentage	
Required	

### Extra Details

Social Security Number
Address
Suite, Apt
City

- The final screen is a confirmation page outlining your decisions.
- As a reminder, any contribution rates noted are simply for modeling purposes and have no impact on The OPC 403(b) Plan.
- Congratulations, you have completed the online enrollment process!

### Authorize Strategy

Please review and confirm the information below before authorizing your new savings strategy.

Contribution Rate(s)

 These contribution amounts are for modeling purposes only and will NOT take effect upon authorization.

**0%** Pre-Tax

**0%** Post-Tax (Roth)

By clicking Authorize, you will be making a percentage-based contribution each pay period that will automatically adjust with increases or decreases to your salary.

[Click here](#) if you would like to convert this back to a fixed dollar contribution

Confirm Strategy

☐ I agree to this savings strategy and [associated disclosures](#)

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AUTHORIZE