



Plan Quick-Start Guide

How do I start?

Log on to: www.trpcweb.com and choose the "Account Login" option at the top of the page.

Our interactive web site allows you to view your account information. In addition to showing account information, you are able to create account statements, view detailed transaction information and utilize financial resource tools. By logging on to www.trpcweb.com you have the tools necessary to manage your retirement account.

The first time you log in you will be asked to provide a User ID and Password. These two fields have been set to our system defaults:

User ID --- Social Security Number (No dashes)

Password --- Last four digits of your Social Security Number

IMPORTANT: The first time that you log in you will be required to set a new User ID and Password (or PIN for the VRU). This process is outlined in the "Account View and Account Transactions for the Internet and Voice Response Unit" section of this guide. It is very important that you change your login credentials or PIN to ensure account security.

Why do accounts become locked or disabled?

As a security measure, your account will become disabled if you enter your User ID/Password combination incorrectly three times.

How can I remove the lock from my account?

If your account becomes locked, you may contact us through two avenues:

- 1) Log on to our web site and select the "**Contact Us**" link and complete the request form or select a live chat session with our Client Care Managers.
- 2) Call us at **1-888-673-5440** between the hours of 7am and 7pm CST to speak with a live representative. If you are unable to call during these times or do not have access to our internet options, please leave a message in our Client Services voice mailbox and we will call you the next business day.

How can I request a Distribution Form?

We have created a number of ways for you to request a distribution form.

- 1) You can log on to our web site and select "**Forms**" under the Reports/Forms drop down menu bar. Once the desired distribution form is selected, it will be ready to print momentarily.
- 2) You can log on to our web site, select the "**Contact Us**" link, and complete the request form.
- 3) You can call one of our Client Care Managers at **1-888-673-5440** and request a distribution form.

How can I make rollovers into my retirement plan?

If you would like to consolidate your retirement assets into your present Retirement Plan, **and your current Plan Administrator confirms to you that your rollover is acceptable to your current Plan,** please do the following:

- 1) Complete a Request for Rollover certification statement and **mail to the address below**. To obtain a copy of the Request for Rollover, please log on to our web site and select “Forms” under the Report/Forms drop down menu bar. Click on the “**Rollover Into Your Retirement Plan**” in the “Form group: Rollover Application Form” section of the page. You can then print the document.
- 2) Request an Application for Benefits from the Plan Administrator of any prior qualified retirement Plan in which you have a vested benefit

and/or,

- 3) Request a Withdrawal Form from the trustee or custodian of your prior qualified retirement plan or eligible IRA.
- 4) In the distribution instruction section, request that a tax-free rollover be **MADE PAYABLE TO:**

**The Retirement Plan Company, LLC Daily Client Account
For Benefit Of: (Your Name and Social Security Number)**

and be **mailed** to:

Mailing Address:

The Retirement Plan Company, LLC
P.O. Box 1429
Brentwood, TN 37024-1429

Overnight Address:

The Retirement Plan Company, LLC
1620 Westgate Circle, Suite 170
Brentwood, TN 37027

- 5) Upon receipt, the proceeds of your rollover will be invested using your current investment elections; if we have not received your investment elections, your proceeds will be invested in your Plan’s current default investment. You may then re-direct the rollover into the investment option(s) of your choice using the Internet or toll-free voice response system (1-888-673-5440).

Customer Service

Our Client Care Managers can provide you with a wide variety of information related to your plan and investments. In addition, they can help answer questions regarding loan availability (if offered with your plan) and distribution information. By calling **1-888-673-5440**, you can speak with a live representative from 7am CST to 7pm CST Monday through Friday, or use the “**Contact Us**” link in your online account to send us a message, or initiate a live chat session. If you are unavailable during our hours of operation, please leave a message in our Client Services voice mailbox and we will call you the next business day.

If you have Internet access, please send us an email at clientservices@trpcweb.com and we will respond within 24 hours.

Voice Response Unit: 1-888-673-5440

Our interactive voice response unit allows you to listen to your account information 24 hours a day, 7 days a week. In addition to hearing your account information, you are also able to initiate transactions. **By dialing 1-888-673-5440, you have the tools necessary to manage your retirement account.**

Account View and Account Transactions for the Internet and Voice Response Unit (VRU)

We have provided a brief overview of some of the options that are available on the Internet and Voice Response Unit. Please note that not all transaction and account views are listed below. For a complete description of both voice response and Internet functionality, please request a FAQ document from your human resource department. If you have any difficulty, please call our customer support line at 1-888-673-5440.

Account Information: This option allows you to hear (VRU) and see (Internet) your account balance as of the most recent valuation date. You may also request to hear/view your account balance on a per-fund and/or per-source basis.

Password Change/PIN Change: This option allows you to change your Password for the Internet or PIN number for the VRU. Please note that changing your PIN number for the voice response unit does not automatically update your password for the Internet. It is very important that the first time you dial the VRU or log into the Internet site you change your PIN/Password.

Investment Information: This option allows you to listen to (VRU) or view (Internet) your investment elections. In addition, you can change your investment elections. Please remember that changing your investment elections only affects your FUTURE money contributions. If you want to change your existing account balance, you must check the “**Conform my balances in all sources to match my new allocation %**” checkbox at the bottom of the Investment Elections page.

Loans: Model a new loan, request loan paperwork, or request a loan check. (Not all plans allow loans. Also, these options vary by plan and eligibility.)

Transfer Balances: This option allows you to transfer your current balance from one or more of your existing investments into one or more new investment choices.

Conform Ending Balance: This option allows you to rebalance your portfolio according to your current investment elections. Please note that this election will not affect your FUTURE money contributions. If you wish to affect your FUTURE contributions you must access the “Investment Elections” option.

Information You Need to Know Prior To Entering a Transaction

Market Value of your Account

The value of your account balance will change each business day to reflect the investment market changes. The balances will be valued as of the end of the previous business day, or the date prices were most recently received. NOTE: For dates when the New York Stock Exchange (NYSE) is closed, your balance will be based on the previous day the NYSE was open. For plans valued less frequently than daily, the value of your account balance will be as of the most recent valuation cycle.

Transaction Request Deadline

Because retirement plans have different needs, we utilize a number of different trading platforms. Please contact your Human Resource department about your specific transaction deadlines.