Simplicity Through Our Technology

Employer website – your one-stop resource

Our award-winning employer website was built to support efficient handling of daily plan and participant needs. The employer website has the tools to help you manage and streamline administrative responsibilities and offers a single location to quickly and securely view, monitor, and update plan information. Our employer website offers many advantages:

- Simplifies plan administration, including the ability to run compliance tests anytime
- Offers participant support, from completing transactions to ordering enrollment materials
- Provides educational tools and informational updates
- Delivers customized quarterly administration and monthly plan confirmation reports
- Facilitates loan modeling, loan paperwork, and distribution processing
- Automates census and payroll submissions
- Enables employers to post custom messages to the participant website

Employer website demo information
https://www.sponsorinsight.com

Client number	209564
User name	Merrilllynch123
Password	Merrilllynch1
Security answer	Merrill Lynch
Phrase	Merrill Lynch
Image	Coffee cup

User-friendly employee website

The employee website provides the level of service needed to help participants with any questions related to their plan accounts. The website provides a suite of retirement planning resources, including articles, calculators, and research. Other tools can be used to:

- Enroll in the plan
- Set retirement goals*
- Track retirement readiness*
- Check account balance*
- Customize content layout
- Set up automatic account rebalancing
- Initiate transactions
- Calculate personal rate of return
- Set/change beneficiaries
- Enroll in managed account service

Employee website demo information
https://myaccount.ascensus.com/ml

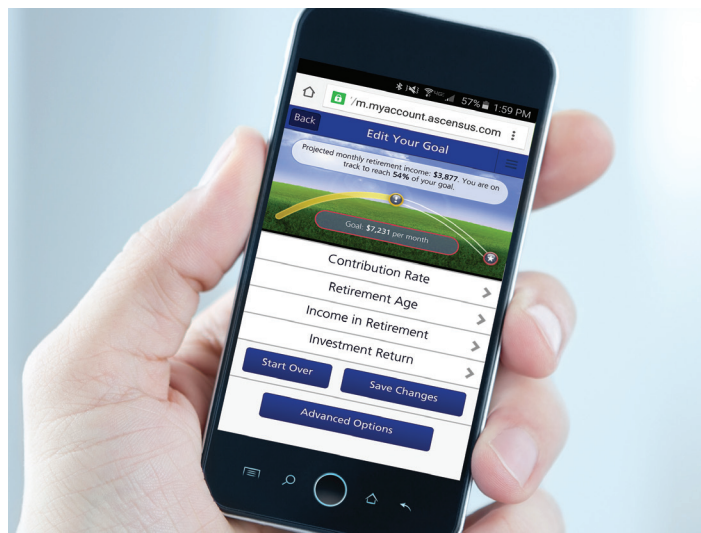|	
Web user ID	888802237ML
Password	PWD123pwd
Date of birth	07/27/1964
First 3 digits of SSN	888
Last 4 digits of SSN	2237
Zip code	19025
Phrase	ML Demo Plan
Image	Keyboard
Security question (Favorite person)	Merrill Lynch

By phone

- Our mobile website enables your employees to quickly and easily view their progress and check their account on the go.
- Our interactive voice response (IVR) system, available in English and Spanish, provides a convenient way to get up-to-date account information and complete core transactions.
- Highly-trained professionals are available to answer questions and provide assistance during business hours.

*This functionality is available on our mobile website; users can connect to the full site for all other functionality.