



A FOCUS FINANCIAL PARTNER

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www.wespac.net
www.retirementvista.com

Important Notice to Plan Participants

New Online Access Information for Your Retirement Account

WESPAC is pleased to announce the activation of our online access service, Retirement Vista, for your employer's retirement plan. This valuable and informative tool is being made available to you as part of WESPAC's record keeping service. You can access your account information from your computer anytime that you wish.

Enrolling Online is quick and easy...you just follow these steps:

1. Go to www.retirementvista.com
2. In the **Welcome Participants** box input your social security number where indicated. Input your date of birth (format MMDDYYYY) in the Personal Identification Number (PIN) box. Click on **Logon**.
3. You will arrive at the Welcome to Online Enrollment Screen. This wizard will walk you through the steps necessary to complete your online enrollment and access your account. Click on **Enroll Now**.
4. Next, fill in your personal information and establish a unique password and user ID (if desired) you can use for future access. Click **Next**.
5. In the My Contributions section you will sign up for how much you would like to come out of your pay check each pay period. Please note that the amount you elect is representative of a per pay period amount, not an annual election. Click **Next**.
6. Now you will want to select your investments. To choose the default fund listed for your plan, choose "Keep the Default Investment" and then Next. To choose your own investments from the options available click on "Choose My Own Investments" and "Create My Own Investment Portfolio" and then Next. On the next screen you will be prompted to input the whole percentages you want invested into each mutual fund offered. You will also see an option for Schwab Personal Choice Account at the bottom which is your individual brokerage account at Schwab. If you would like any of your future contributions to be automatically directed to your brokerage account, enter the percentage of each deposit that should be automatically transferred into this listed fund. Click **Next**.
7. Be sure to enter your beneficiary information...this is your opportunity to be certain this information is current and on file with the new plan. Click on Add Beneficiary and enter all required information for your primary beneficiary(ies) and contingent. When you finish entering the information for the first individual make sure to click on **Continue** at the bottom of the box (not Next on the very bottom of the screen). Once you have entered all beneficiaries into the system you can then click on **Next** at the bottom.
8. Now take a moment to review all information. Once you are satisfied that all of your information is correct, click on the **Enroll Me** confirmation button.
9. Your enrollment will be complete once you receive the **Enrollment Completed Successfully** message...and that's it...you are done!

IMPORTANT REMINDERS

- *Even if you are not contributing at this time, we encourage you to enroll so that... 1) you pick your new investment choices...2) your personal information is up to date...3) your desired beneficiary designation is on file.*

If you have any questions, please contact your WESPAC's Participant Service Center at (800) 535-4253, option 1.