



# Portal Overview

WEBINAR SERIES



\*The material in this presentation is being provided for educational purposes only. It should not be construed as providing legal, investment, or tax advice and is not designed to be complete in all material respects.



# Meet Bradley Robertson

Slavic401k Service Ambassador





# What We'll Cover

Step by step video navigation

Setting up your 401k to maximize your investment

Key tips and best practices to protect yourself

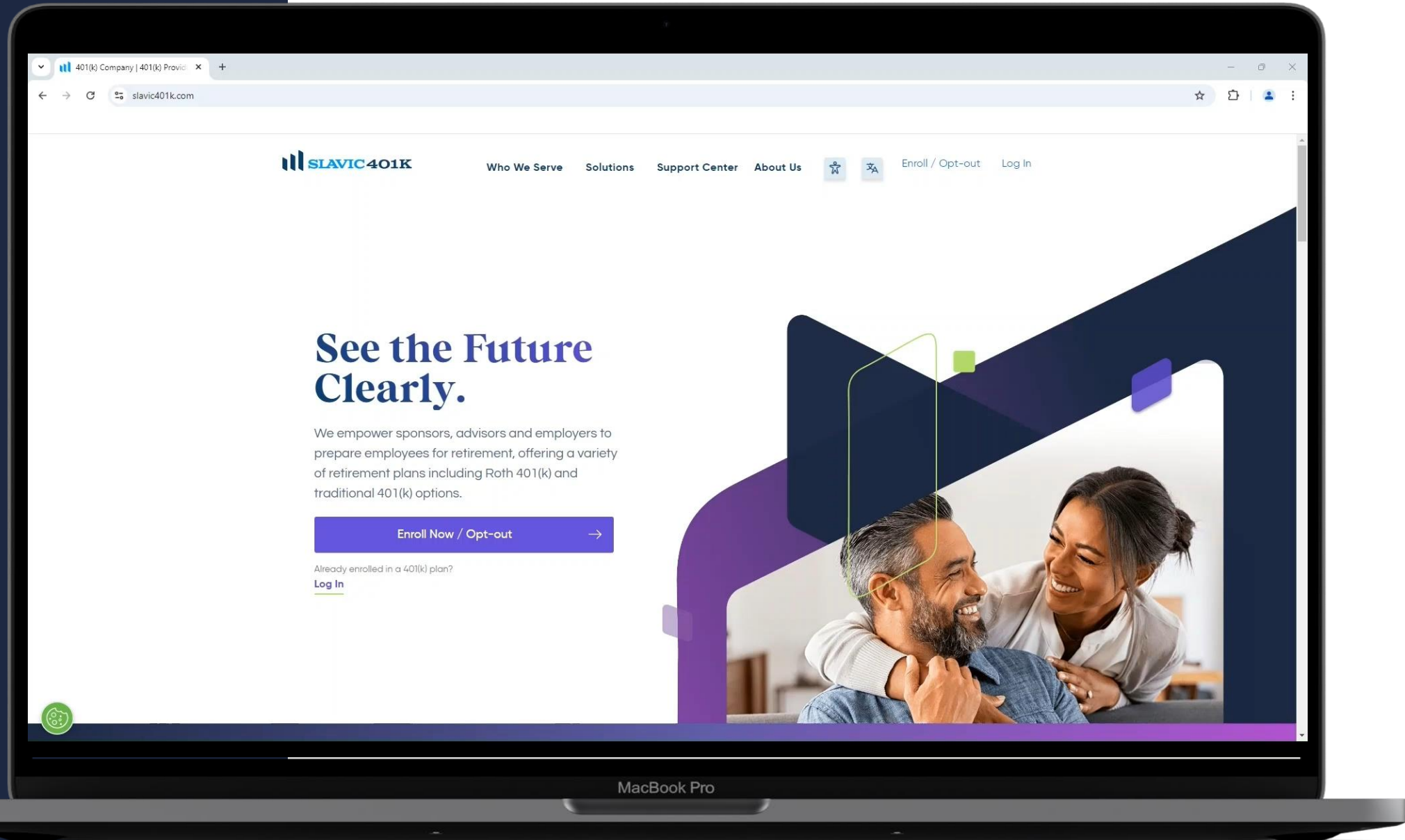
Valuable insights you can only find here

# Enrolling is Easy



# Tour the Enrollment Process

- Participants may enroll in their 401(k) plan at any time after receiving their first paycheck.
- Each plan may have different entry requirements.
- Your first deferral may take 1-2 pay cycles to process.
- Deferrals are deducted every pay cycle.



# Things to Keep in Mind

- Please wait for your first deferral to be processed before signing up for Portal Access.
- Automatic Enrollment will enroll you in the 401(k) plan. You may opt out if you do not wish to participate.
- Deferrals are deducted every pay cycle, with a 2024 yearly limit of \$23,000. If you are 50 or older by December 31, 2024, you can use the IRS catch-up amount of \$7,500.
- *For assistance, please contact our Customer Service Team.*

# Troubleshooting

- Make sure your username is correctly inserted.
- The username field is case sensitive and must never be your Social Security Number or email address.
- You may select the “Forgot username or password?” option to reset.
- If you are having issues with receiving the multi-factor authentication code, check that the Slavic number is not whitelisted or blocked.
- Clear your web browser cache, cookies, and web browsing history for all time.



# Dashboard

Manage your retirement account online

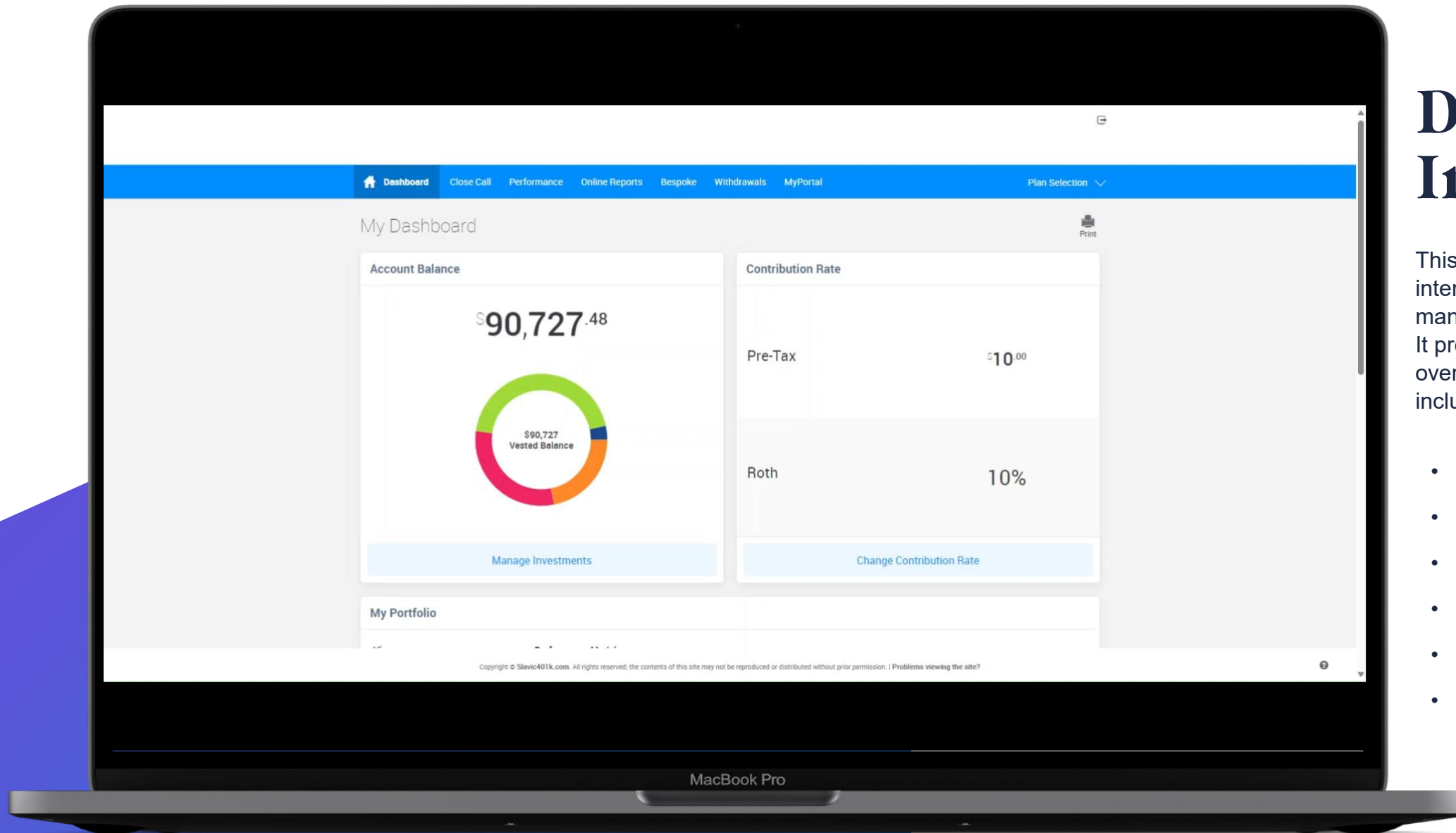


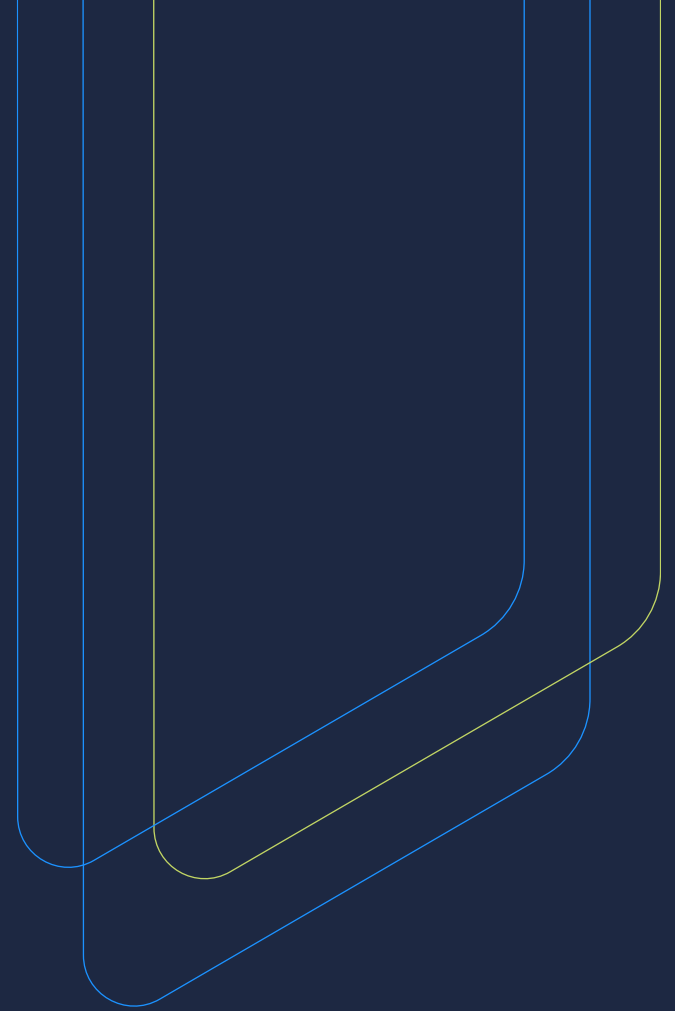


# Dashboard Insights

This is a user-friendly online interface that allows you to manage your retirement account. It provides a comprehensive overview of your account, including:

- Track Your Account Balance
- Investment Performance
- Contribution Management
- Adjust Fund Allocations
- Update Personal Information
- Access Retirement Planning Tools





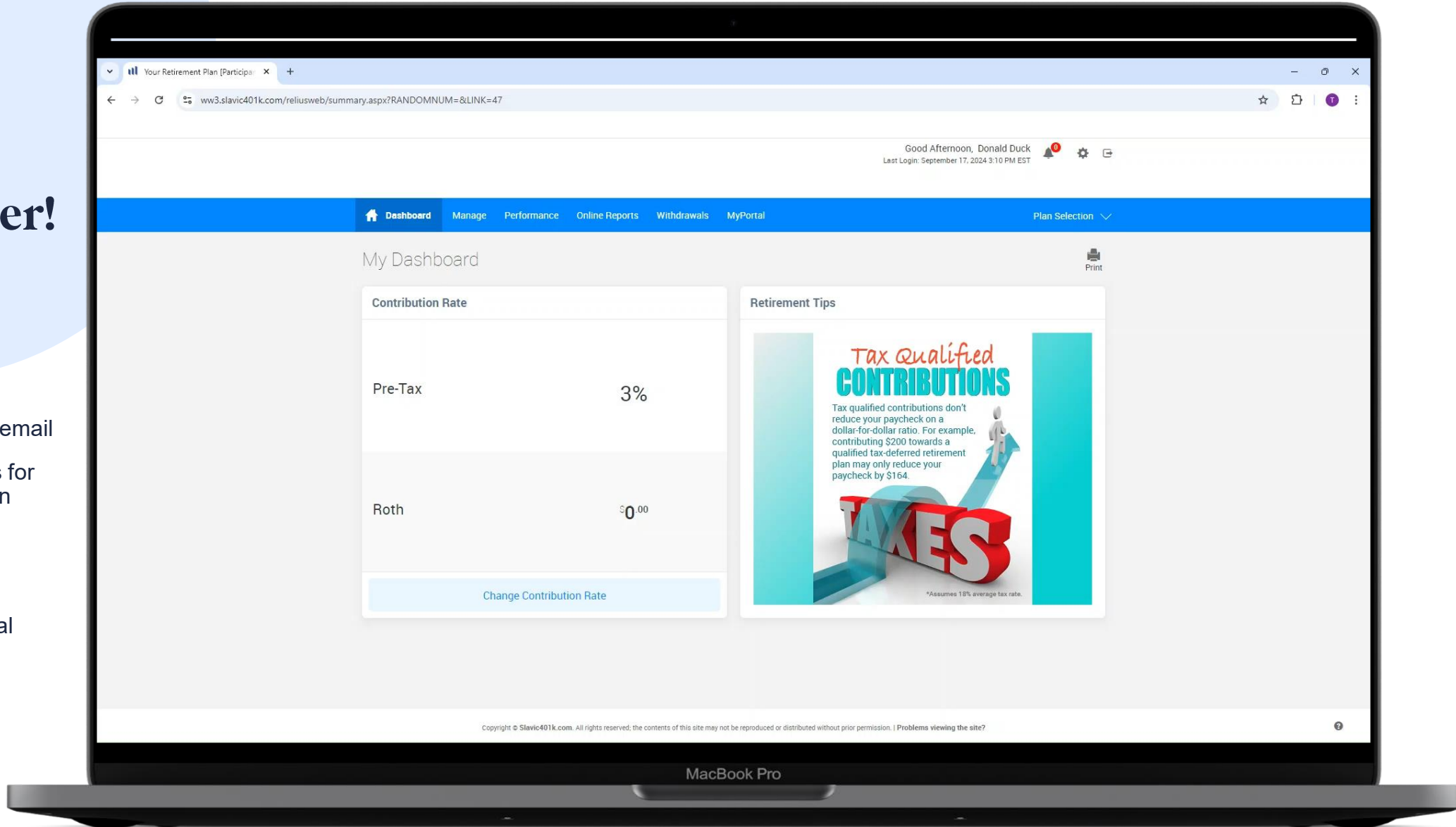
# Settings and Controls





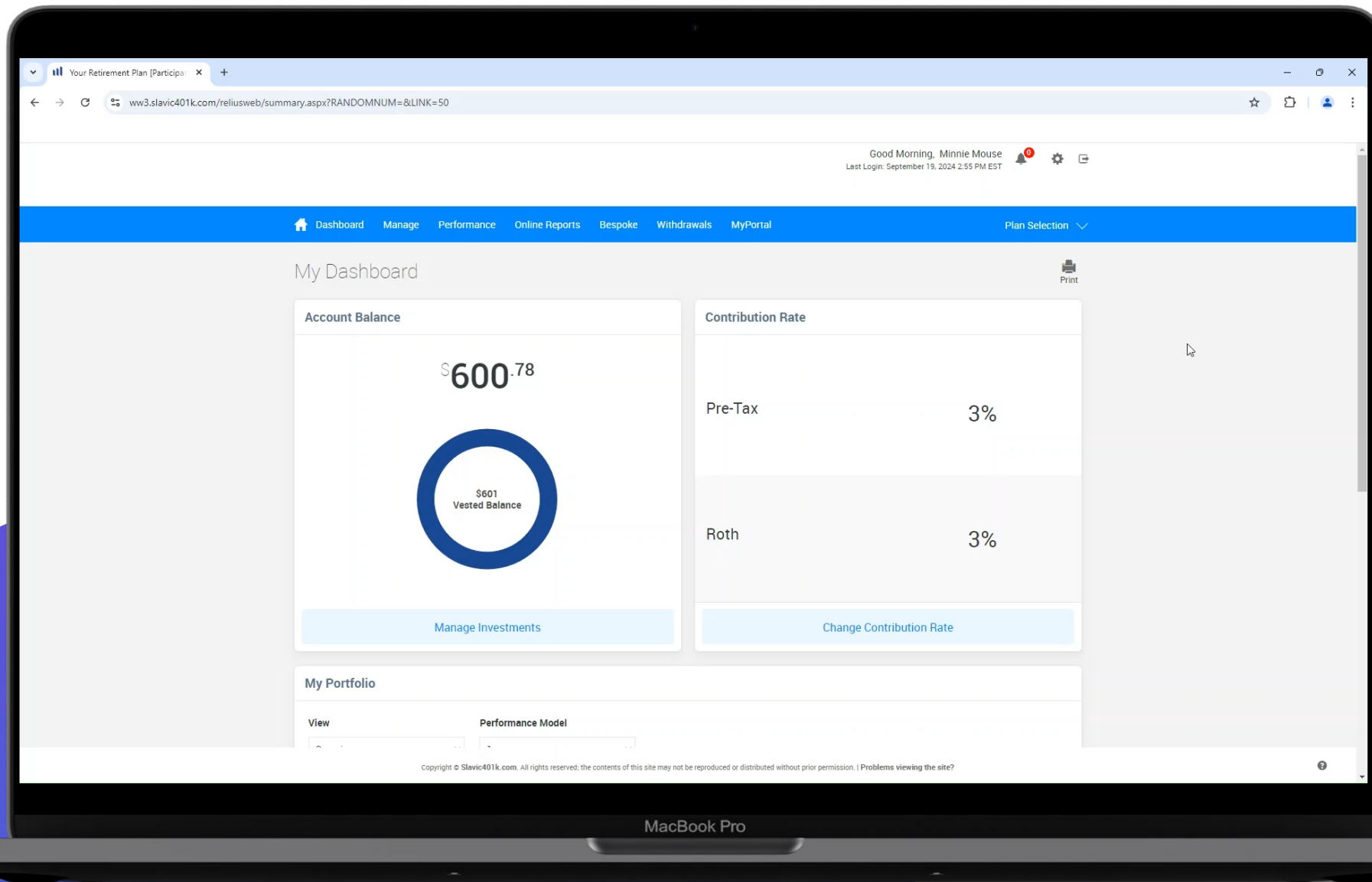
# Welcome to Your 401(k) Control Center!

- Update address, phone, email
- Choose contact methods for multi-factor authentication
- Edit security questions
- Update beneficiaries
- Print and notarize spousal consent forms
- Change password and username



# MyPortal





# MyPortal

- Where to locate Account Number
- Submit a new Distribution, Loan, or Hardship request
- Download Forms including (1099r)
- Fund performances
- Quarterly Statements
- Email express
- Distribution request/status history
- Plan Highlights: Eligibility Rules, Entry Date, Employer Match Information, and your Deferral Options
- Summary Plan Description



# Investments



# Easily Manage Your Investments

## Change Elections

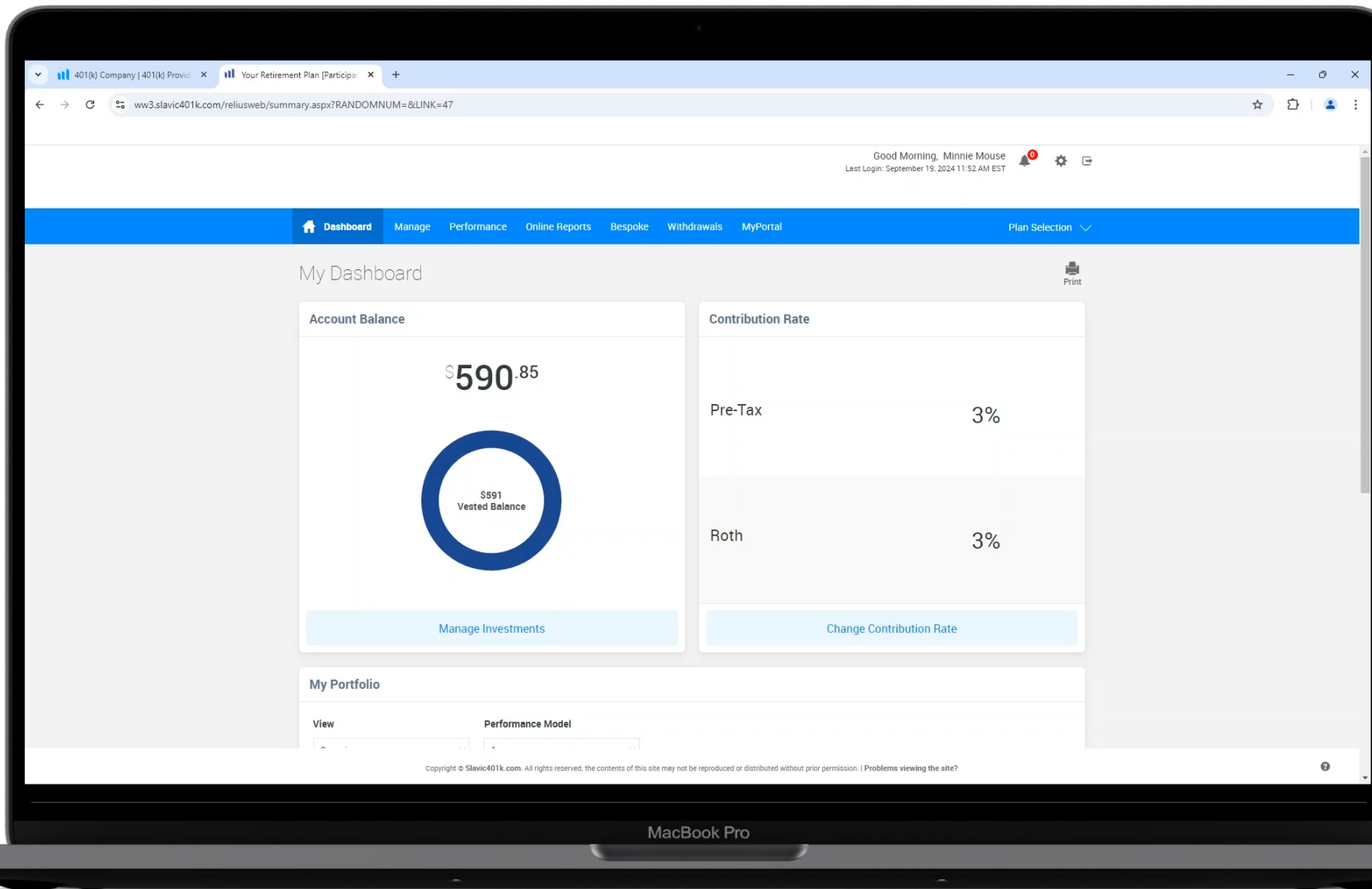
The funds you put the money from your paycheck into

## Transfer Funds

Transfer the money in your account between the funds in your plan

## Rebalance

Make the balance match your existing target or set a new one

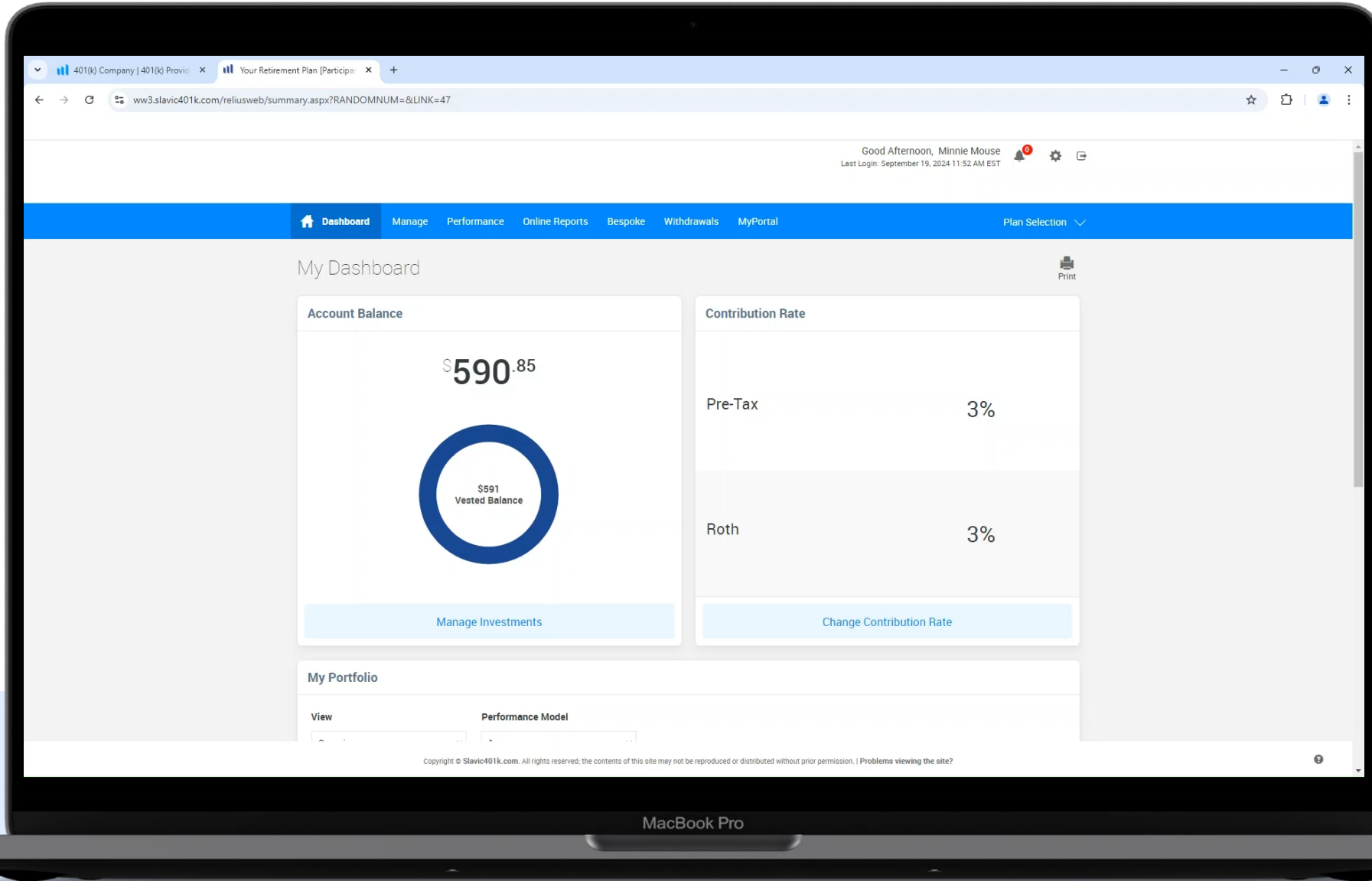


# Quick Access Tools





# Quick Access Tools



Electronic Statements

Report Building

Transaction History

Web Requests

# Have Questions?

Visit [slavic401k.com/support](https://slavic401k.com/support)

This webinar presentation will be shared with the attendees and available online at [Slavic401k.com](https://Slavic401k.com)



# Thank you!

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