

VOICE RESPONSE SYSTEM

Call toll-free 1-888-263-4636 or 798-6442.
(For retirement plans only).

- ◆ Enter your Social Security Number.
- ◆ Enter your personal identification number followed by a pound sign.

Select from the following options

- 1 Personal Account Information
- 1 Account Balance Information
- 2 Investment Information
- 3 Contribution Information
- 4 Loans
- 5 Transfer Between Funds
- 6 Conform Ending Balances
- 2 Current Investment Rates
- 3 Change PIN Number
- 4 General Information
- 9 End The Call



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Actuaries, Consultants &
Administrators
for Employee Benefit Plans

WERNTZ & ASSOCIATES, INC.

INFORMATIONAL
SYSTEM
VOICE &
INTERNET

ACTUARIES, CONSULTANTS
& ADMINISTRATORS FOR
EMPLOYEE BENEFIT PLANS



MAKING IT EASIER FOR YOU

ACCESSING YOUR ACCOUNT

Not all your important decisions are made from 9 to 5. We understand that you may need to have access to your retirement plan or cafeteria information at any hour — even on weekends. There is no need to wait for “business hours” to take care of business. Not only can you get automated assistance 24 hours a day, seven days a week, but you can use either the telephone or the Internet to access your retirement plan, and the Internet for your cafeteria plan.

Information is just a phone call or mouse click away. The Wertz and Associates Informational System gives you convenience and accessibility that are so important to managing your retirement plan account.

WHERE DO I GO TO GET INFORMATION?

- ◆ Internet: www.wertz.com. Enter the web site and click on Participant Information. This is a secured site for your protection.
- ◆ Telephone: 1-888-263-4636 (1-888-BNF-INFO) or 798-6442. Either of these numbers will access the informational system. Cafeteria information is not available on the toll free number.

INTERNET ACCESS

Once you have entered the site, click on Participant Information and enter your User ID Number (Social Security Number) and your Password (the last 4 digits of your Social Security Number). Click on Participant and you have entered the system. A summary of plan information and other basic information will appear along with the following other features that may be available to you.

Some of the features may not have been authorized by your plan sponsor.

- ◆ **Participant Summary:** Displays the current account balances.
- ◆ **Password Change:** Passwords may be changed (recommended) at any time.
- ◆ **Personal Information:** Your current information. You may make changes and add additional information.

RETIREMENT PLANS

- ◆ **Account Balance:** Investments are listed by fund and by source.
- ◆ **Beneficiaries:** Displays your current beneficiaries that are on file. Any changes to this information must be made with a form, and can not be changed on-line.

- ◆ **Investment Profile:** Displays the current share price of each fund in the plan.
- ◆ **Rate of Return:** Displays the estimated rate of return for your plan for the current plan year.
- ◆ **Contributions:** Last amount contributed to the plan.
- ◆ **Investment Elections:** Current investment elections.
- ◆ **Transfer Funds:** Permits the transferring of money between the various funds.
- ◆ **Rebalance portfolio:** Automatically rebalances the current investments to the current election percentages.
- ◆ **Conform to target:** Automatically rebalances the current account balances to target percentages.
- ◆ **New Loan:** For plans with loan provisions, loan paper work and applications can be made through the system.
- ◆ **Transactions by fund:** Each contribution, expense charge or dividend by fund is listed for additional information.
- ◆ **Retirement Calculator:** Estimate income and savings for retirement.

CAFETERIA PLANS

In addition to the basic Internet options the Cafeteria Plans can access the following.

- ◆ **Benefit Summary:** A summary of the account balances for each type of benefit. Contributions and projected balances are also available.
- ◆ **Claim History:** Details by category of claims submitted, approved and paid. Information may be accessed by dependent, dates or type of claim.