

SAMPLE

Western Region N E C A
401(k) Plan

RETIREMENT PLAN ENROLLMENT

Plan ID: 8710

Dear :

Congratulations! You are eligible to enroll in the Western Region N E C A 401(k) Plan . Once you have reviewed the Plan information provided in your Enrollment Kit, you may enroll online or by calling the toll free Interactive Voice Response (IVR) system.



TO REGISTER and ENROLL ONLINE VISIT:

www.TA-RETIREMENT.com

Website Registration:

- Step 1: Click on First time user? Register now located in the top left hand corner of your screen within the "Your Account: LOGIN" section
- Step 2: Select "I am an employee" and click "**Continue**"
- Step 3: Enter your Social Security Number and click "**Continue**"
- Step 4: Enter your Date of Birth and ZIP/Postal Code and click "**Continue**"
- Step 5: Create your own unique **Username** and **Password** and click "**Next**"
- Step 6: Agree to the site Terms of Use
- Step 7: Agree to the Consent to Do Business Electronically agreement

Plan Enrollment:

- Step 1: At the **Welcome to Plan Enrollment** screen, click on "**Start**"
- Step 2: Read and accept the Participant Agreement for Online Enrollment by clicking on "**Agree**"
- Step 3: At the **Account Setup – Address Confirmation** screen, verify your information and make all necessary updates. When all of the information is correct click "**Next.**"
- Step 4: **SET UP YOUR CONTRIBUTION RATE** — Your contribution rate is the amount that will be withheld from each paycheck on a pre-tax basis. Enter the rate to be withheld from each paycheck and confirm by clicking "**Next.**" The contribution rate you select will be sent to your employer to be deducted from your paycheck based on payroll cutoff dates.
- Step 5: **ENTER INVESTMENT ELECTIONS FOR FUTURE CONTRIBUTIONS** — Your pre-tax contributions will be invested according to the selections you make here. Enter the percentage to be allocated to each fund, in whole percentage increments. The total of your allocation percentages must equal 100%. Click "**Next.**"
- Step 6: **PLAN ENROLLMENT REVIEW** — A summary of your contribution rate and investment elections will be shown on this page for your review. Click on "**Confirm.**"
- Step 7: **PLAN ENROLLMENT CONFIRMATION** — A copy of your requested changes may be printed for your records. By clicking "**Continue**" you will be taken to the **Account Information** screen.

(Over)