



# Advisor and Sponsor Website Navigation Quick Guide

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## Aspire Website

Login website link: <https://investlink.aspireonline.com/Login.aspx>

The screenshot shows the login interface for the Aspire InvestLink Retirement Plan. On the left, there is a white 'Account Access' box with fields for 'Username' and 'Password', a 'Show' link, a 'Sign In' button, and links for 'Forgot your Password?' and 'Forgot your Login? (Participants Only)'. Below these is a 'Create Login' link. The main blue area contains the 'Welcome to InvestLink<sup>SM</sup> Retirement Plan Account Access' heading, a sign-in instruction, and a goal statement: 'Our goal is to make your experience easy and fulfilling. By logging in, you authorize the processing of all transactions placed during your session.'

## Reports

Both Sponsors and Advisors have access to *Reports and Extract reports*, which are customizable. *Statements* can also be viewed and downloaded under the *Advisor Reports* drop down.

- At the top right, verify that that correct plan is selected on the top right of the screen.
- Select *Advisor Reports* and report options will appear in the drop downlist.
- To view and download generated reports select *Job Queue*.

The screenshot shows the top navigation bar of the Aspire website. The 'Advisor Reports' dropdown menu is open, showing options for 'Reports', 'Extracts', 'Statements', and 'Views'. Other elements include the Aspire logo, user information 'Welcome, AWEBDL-7', 'My Profile', 'Log Out', 'Last login: Thursday, July 20, 2023 7:22 PM', and the selected plan 'Aspire Financial Demo Plan - 403B (30105)'. The 'Investments' and 'Job Queue' links are also visible in the navigation bar.



## Report and Extract Examples

### Reports

<b>Contribution Rate Change Summary</b> This report displays information related to participants who have changed their deferral amount and/or rate during a specified date range.	>
<b>Contribution Rates By Participant</b> This report shows the current contribution amount and/or rate for all participants	>
<b>Model Drift</b> Provides a report for Model Drift	>
<b>New Participants</b> This report generates a list of participant accounts, and associated data, that have become eligible to participate during the selected date range.	>

### Extracts

<b>Age 59 ½</b> Generates a spreadsheet reporting current account balances and contact information of participants aged 59.5 or older.	>
<b>Auto Enrollment</b> This extract will produce two spreadsheets for the selected Plan(s) - Plan Level Auto Enrollment and Participant Level Auto Enrollment	>
<b>Flow</b> Generates a spreadsheet reporting transfers in by participant, plan, plan type, product code, and payroll date within a specified effective date range.	>



# Statements

**Filters:**

Status: [Dropdown] Locations: [Dropdown] [Apply](#)

**Select participant:**  All Plan Participants [Select New Participant](#)

**Statement period:**

From: [7/1/2024] [Calendar icon]

To: [9/30/2024] [Calendar icon]

**Reports**

Statements

Activity Summary by Participant

Activity Summary by Plan

**Sort participant by:** [Zip Code, SSN] [Dropdown]

**Sort detail fund/model and contribution data by:** [Contribution Desc, Fund Desc] [Dropdown]

**List investment in this order:** [Alphanumeric] [Dropdown]

Format For Duplex Printing

[Process](#)

## Views

- Asset Allocation by Age Group**  
This report displays the current assets in five age groups. Each age group can be expanded to display the investment categories represented by the assets. Each investment category can be expanded to display the investments that represent that category. [>](#)
- Assets Under Management**  
Shows a listing of all assets under management by investment, either for the current plan or all accessible plans. [>](#)
- Average Balances by Age Group**  
This report shows how many participants are in each age band, and the current balance of all participants within that age band. [>](#)
- Fund Utilization**  
This report displays the investment categories into which plan assets are invested, broken down by dollar and percentage. Each investment category can be expanded to display the investments that represent that category. [>](#)
- Participant Diversification**  
This report shows you the number of investments in which plan participants are invested. The results are shown as a percentage of all participants that meet the filter criteria. [>](#)
- Terminated Participants**  
This report shows all participants in a plan who have a Terminated status, with their gross and vested balances. [>](#)



## Transaction History

Select > Plan > Participant> click the participant's name you are inquiring into. You will be redirected to the participant dashboard. Here is where you will see the transaction history tab and other options.

Home **Plan** ▾ Resources/Tools ▾ Advisor Reports ▾

Balances  
Loans  
**Participants**

**Participant(s) 24**

Name	Account Number	SSN	Direct Advisor	Hire Date	Status	Enroll Date	Location
<a href="#">Bot Last 3_Bot First 3 B</a>				08/01/2006	Active		
<a href="#">Bot Last 5_Bot First 5 B</a>				08/01/2006	Active		
<a href="#">Demo-LNX1_Demo-FNX1</a>				01/11/2006	Active	10/01/2017	
<a href="#">Demo-LNX10_Demo-FNX10</a>				03/15/2012	Active	06/15/2012	

### Participant Dashboard Account Balance Details

Participant: Demo-LNX1, Demo-FNX1

Account Number:

Select New Participant

Information Balances **Transaction History** Personal Statement

Participant Transaction Options ▾

Details **By Fund** By Source Personal Rate Of Return Outstanding Loan Balance

View selected participant account assets by Details, Fund, or Source by clicking the respective tab.

Click on the arrow to the left of the investment to view the underlying source breakdown, or in the case of a model portfolio, the underlying investments in the model.



## How to View Investment Holdings

There are two options for seeing holdings.

- You can view holdings on the participant dashboard, following the steps above.
- You can view holdings from the home page. The home page allows you to also view participant assets.

### Find Participant

SSN	First Name	Last Name	Plan	Find
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Find"/>

### Summary

	Plan Relationships	Individual Participant Relationships	Total
Plans	5	1	6
Participants	110	20	130
Participants With Balance	36	19	55
Total Assets	\$238,455.85	\$226,615.79	\$465,071.64

Balances calculated on: 9/21/2018 12:00 AM

Dummy Text

### Plans 6

Plan Type	Number of Plans	Number of Participants	Balance
> 401K	2	41	\$236,455.79
∨ 403B	1	21	\$77,058.51

Plan Name (Plan Id)	Number of Participants	Participants With Balances	As of Date	Balance
> Aspire Financial Demo Plan - 403B (30105)	21	5	9/21/2018	\$77,058.51

Page size: 10 | 1 items in 1 pages



## Changing Investments

Agents who have been granted Limited Trading Authority (LTA) will be able to submit certain transactions through the web on behalf of the account holder. Changes can only be made from the participant dashboard.

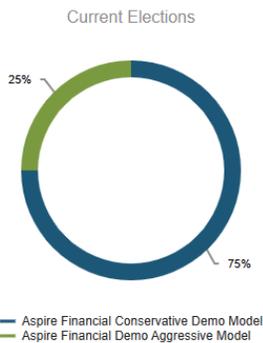
Select Plan > Participant > click the participant's name you want to make the changes for. It will bring you the participant dashboard.

### Select > *Participant Transaction Options*

A screenshot of a web interface showing a dropdown menu. At the top is a dark blue button labeled "Select New Participant". Below it is a dropdown menu with "Participant Transaction Options" selected and highlighted with a red box. The dropdown menu is open, showing four options: "View Participant Website (SSO)", "Loan Modeling", "Investment Direction" (highlighted with a red box), and "Transfer Existing Savings" (highlighted with a red box).

### *Investment Direction* >

- For updating future funds, select *Change Investment Elections*



Fund	Ticker	Elections (%)
<a href="#">Aspire Financial Conservative Demo Model</a>		75.00
<a href="#">Aspire Financial Demo Aggressive Model</a>		25.00

CHANGE INVESTMENT ELECTIONS



Enter Percent next to the fund you are choosing under New Elections %. You can also Filter by fund name or ticker for a specific selection.

Fund	Ticker	Current Elections (%)	New Elections (%)
<a href="#">Aspire Financial Conservative Demo Model</a>	<b>i</b>	75.00	<input type="text" value="0.00"/>
<a href="#">Aspire Financial Demo Aggressive Model</a>	<b>i</b>	25.00	<input type="text" value="0.00"/>
<a href="#">American Funds 2010 Trgt Date Retire R5</a>	REATX	0.00	<input type="text" value="0.00"/>
<a href="#">American Funds 2020 Trgt Date Retire R5</a>	RECTX	0.00	<input type="text" value="0.00"/>
<a href="#">American Funds 2025 Trgt Date Retire R5</a>	REDTX	0.00	<input type="text" value="0.00"/>
<a href="#">American Funds 2030 Trgt Date Retire R5</a>	REETX	0.00	<input type="text" value="0.00"/>



# Transfer Existing Savings: Percentage

## Transfer Existing Savings: Percent

Participant: Demo-LNX1, Demo-FNX1

Account Number:

Select New Participant

Information Balances Transaction History Personal Statement

Participant Transaction Options

Funds/Models marked with a red number symbol (#) are not available for transfer activity due to restrictions set by the asset manager and/or fund families involved.

Select Transfer Type:

This function allows you to move existing funds from one fund to another.

- First step: you will enter the percentage you’re requesting to be transferred out of an existing fund.
- Second Step: enter in the percentage of each fund you would like to reinvest/transfer the existing fund into. NOTE: this column must equal 100%
  - Example: if you are moving 50% out of a fund and requesting to move to just one fund. You will enter 100% in the new fund column because all the 50% is going to that one fund.

You can also make changes by Dollar amount for transferring existing savings.

Investments	Market Value	Available for Transfer	% of Each Fund Balance to be Transferred Out	% of Total Balance to be Transferred In
Aspire Financial Conservative Demo Model	\$58,319.30	\$58,319.30	<input type="text"/>	<input type="text"/>
Aspire Financial Demo Aggressive Model	\$15,888.35	\$15,888.35	<input type="text"/>	<input type="text"/>
Aberdeen Global High Income A	\$0.00	\$0.00		<input type="text"/>
American Funds 2010 Trgt Date Retire R5	\$0.00	\$0.00		<input type="text"/>

Fund	Market Value	Available for Transfer	From Dollar	To Dollar
Aspire Financial Conservative Demo Model	\$58,319.30	\$58,280.41	<input type="text"/>	<input type="text"/>
Aspire Financial Demo Aggressive Model	\$15,888.35	\$15,885.39	<input type="text"/>	<input type="text"/>
Aberdeen Global High Income A	\$0.00	\$0.00		<input type="text"/>
American Funds 2010 Trgt Date Retire R5	\$0.00	\$0.00		<input type="text"/>

You can also reallocate and rebalance the current holdings and set up a scheduled rebalance.

Select Transfer Type:



Current Holdings

Investments	Market Value	Available for Reallocation	Current Allocation	To Percent
Aspire Financial Conservative Demo Model	\$58,319.30	\$58,319.30	78.59%	<input type="text"/>
Aspire Financial Demo Aggressive Model	\$15,888.35	\$15,888.35	21.41%	<input type="text"/>



## Transfer Existing Savings: Schedule

Participant: Demo-LNX1, Demo-FNX1

Account Number:

Select New Participant

Information

Balances

Transaction History

Personal Statement

Participant Transaction Options ▾

Funds/Models marked with a red number symbol (#) are not available for transfer activity due to restrictions set by the asset manager and/or fund families involved.

Select Transfer Type:

Schedule ▾

Transfer Type:

Fund Transfer

Rebalance

Frequency Period:

Annually ▾

Start Date:

12/15/2024



End Date:



Submit

Cancel

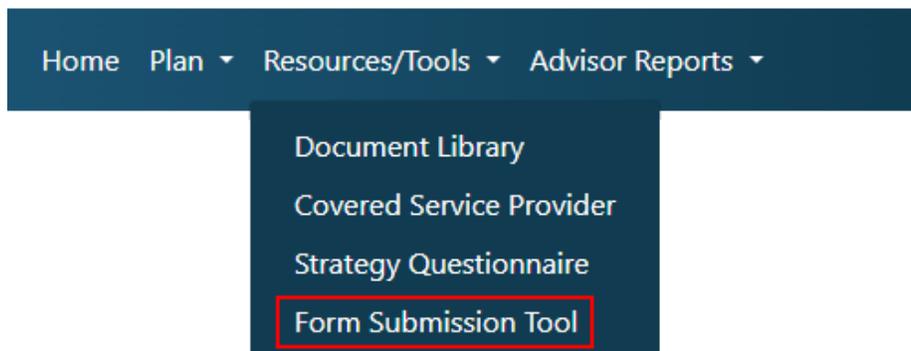


## Form Submission Tool

To safely and securely upload paper requests for existing accounts, please utilize the Form Submission Tool located on the client portal for the following transactions:

- Distribution requests.
- Loan requests (if the retirement offers loans).
- Beneficiary changes.

### Select Resources/Tools > Form Submission Tool



Click the document tab icon next to the name of the participant you are uploading the form for and follow the steps.

### Form Submission Tool Select Participant

Search by name, account number, SSN, hire date, statu

Name	Account Number	SSN	Direct Advisor	Hire Date	Status	Enroll Date	Location	Upload Form
<a href="#">Bot Last 3_Bot First 3 B</a>	603192	XXXXX0003		08/01/2006	Active			
<a href="#">Bot Last 5_Bot First 5 B</a>	603194	XXXXX0005		08/01/2006	Active			
<a href="#">Demo-LNX1_Demo-FNX1</a>	602973	XXXXX0001	Stephen Tague	01/11/2006	Active	10/01/2017		



## Enrollment Forms

To submit enrollment forms, exchange/transfer forms and Plan Establishment Guides, please visit:

<https://www.pcsretirement.com/aspire/tools/forms-submission-tool>

Please use this tool to upload the following forms:

- Enrollment
- Exchange/transfer/rollover
  - For new participants, please utilize this form
  - For existing participants, please log into your retirement account
- Plan establishment guide

For all other form submissions, please log into your retirement account.

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## Forms and Document Library

Start your retirement journey today by accessing our comprehensive collection of enrollment forms and essential documents.

[Learn More](#)

### Instructions

Please complete the following fields, then upload your form, and submit.

**Important:** Ensure form is complete with all required approvals and signatures before submitting.

#### Participant Information

First Name:

Last Name:

Email:

#### Plan Information

Plan Name:

#### Form Information

Select Form Type, Upload Form and Submit

Form Type:

Form Upload: \*





## ASPIRE Forms

Various ASPIRE forms can be located here: <https://www.pcsretirement.com/aspire/forms-and-documents>

- Select type of account request is for
- Locate the type of .PDF form needed under the type of account

Forms & Documents Library	
Advisor / Firm	+
403(b)	+
457(b)	+
Payroll Deduction IRA	+
Roth IRA	+
SEP IRA	+
SIMPLE IRA	+
Traditional IRA	+