

ONLINE ENROLLMENT - SIMPLE START



GETTING STARTED

1. Log into My Alerus at AlerusRB.com or click the link in your welcome email.
2. The first time you log in, you will need to set up online access. Follow the prompts to set up your account. Once complete, click the **Log in** button and enter your credentials.
3. You may have multiple enrollment options depending on the set-up of your plan. If so, click on **Simple Start**, otherwise you will be automatically directed to the online enrollment guide.

HELPFUL HINTS

- At any point in the process, select **Enrollment Information** to see pertinent details on your plan including regulatory notices and plan highlights. Spanish is also available using the toggle on the top right.
- Click **Return to Start** at any point to get to the home menu.

ENROLLMENT

To begin, enter your current annual salary and payroll frequency.

STEP ONE: YOUR CONTRIBUTION

Select pre-tax and/or Roth (if available) contributions by sliding the tool bar or hand keying in an amount. View information on source types by clicking the source name.

If your plan supports automatic contribution increases, indicate whether you would like to annually increase your contribution for each source. If you select yes, enter the percent of the increase and your target percentage goal.

STEP TWO: YOUR INVESTMENTS

Enter your selected investment allocations. Allocations must be whole percentages and total 100%. View fund fact sheets by clicking the fund name. If you need guidance on setting allocations, click **Investment Questionnaire** from the left side menu.

STEP THREE: YOUR BENEFICIARY

This section will be displayed if your plan supports online beneficiaries. Answer the questions regarding marital status and then enter your beneficiary information. If this section does not appear, please see your employer for a form to designate beneficiaries.

STEP FOUR: CONFIRMATION

Review your contribution election(s), investment election(s), and beneficiary(ies). Acknowledge any prospectuses before clicking **Finish**.

Congratulations you have successfully enrolled in your plan!

FOR MORE INFORMATION

Client Service Center

800.433.1685 :: info@aleraus.com

This information for informational and discussion purposes only.

Investment products: 1) Not FDIC insured, 2) Not guaranteed by a bank, 3) May lose value.

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	Per Payroll	Annual
Employee 401(k) Deferrals	\$20.83	\$500
Roth Deferral	\$0	
Total:	\$20.83	\$500

Investment Name	Future
Vanguard Mid Cap Index Adml	%
VANGUARD REAL ESTATE INDEX	%
ALERUS MONEY MARKET	%
T ROWE PRICE BLUE CHIP.GROWTH	%
FED HERMES INSTL HIGH YIELD BD	%
GBEAT-WEST T ROWE PRICE MC GR	%
MFS MID CAP VALUE	%
VANG TARGET RETIREMENT 2055	%
VANG TARGET RETIREMENT 2060	%
VANG TARGET RETIREMENT 2065	%

