PLAN GATEWAY
PLAN SPONSOR WEBSITE

Easy, secure access to your retirement plan information is important! Log in to our sponsor website by following these easy steps:

1. Go to **alerusrb.com** and click **Login** in the upper right corner of the page. Select **Retirement Access** from the dropdown menu.
2. Enter your plan sponsor **User ID** and click **Enter**. Then enter your plan sponsor **Password** and click **Log In**. The first time you log in, enter your **Temporary Password**. You will then be prompted to change your **Password** and answer security questions.
3. Click on **Plan Gateway** and select your **Plan ID**. If you have access to multiple plans, they will be displayed here.

PLAN GATEWAY HIGHLIGHTS

MANAGE MY PLAN

SUMMARY
- Monitor alerts for timely updates and notices.
- At-a-glance summary of plan assets, last contribution, plan participation, and web usage.

PLAN FEATURES
- Highlights features in the plan and the next scheduled realignment dates.

BALANCES
- View by investment, source, asset class.
- Query and download activity, see Investment Changes.

INVESTMENT PERFORMANCE
- Historical fund performance, investment prices, and current market and prospectus information.

MANAGE LOANS (IF OFFERED)
- Query loans by status (current, new, past due, paid).
- View payment history and amortization schedules.

CHECK DISBURSEMENTS
- Search disbursements by SSN, date, or type.
- Expand to see payee name and address.

MANAGE MY CONTRIBUTIONS

CONTRIBUTION GATEWAY
- Submit plan contributions.
- Review contribution history.

CONTRIBUTION DEPOSITS
- Browse contributions by source, trade, or payroll date.
- Download to CSV file.

MANAGE MY PARTICIPANTS

SELECT PARTICIPANT
- Search by full or partial name, by SSN, or by status.
- Edit participant information (address; date of birth, hire, term, or rehire).

PENDING ACTIVITY
- View current and scheduled transactions.
- Review and approve transactions waiting for approval (if offered).

VIEW STATEMENTS
- Search, then click to view or download participant statements.

MANAGE MY SITE

RETRIEVE FILES
- Use the **File Type** drop-down menu to download forms (enrollment, distribution, beneficiary, and more).
- Use the **Payroll Reports** drop-down to retrieve weekly files, including new loans, rate changes, and new enrollees.

SUBMIT FILES
- Upload confidential information here. Select a **File Type** using the drop-down menu. Enter description of the file and attach your document.

UTILITIES
- View transactions and web activity.

REQUEST REPORTS
- Request reports to help manage the plan.

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