



## PARTICIPANT WEBSITE ACCESS INSTRUCTIONAL FLYER

### GAINING ACCESS TO THE WEBSITE

- GO TO [WWW.KEENAN.COM/](http://WWW.KEENAN.COM/)
- CLICK ON: CLIENT LOGIN
- CLICK ON: APPLE INSTABALANCE LOGIN



### STARTING AT THE APPLE PLAN HOME PAGE

ALSO CALLED – APPLE PLAN GENERAL INFORMATION PAGE

LOCATE THE FOLLOWING 5 PAGE SELECTIONS ON THE LEFT;

- **APPLE PLAN GENERAL INFO** – THE APPLE HOME PAGE
- **INSTABALANCE** – PARTICIPANT ACCOUNT INQUIRY CHOICES
  - **LOGOUT**
  - **PLAN SELECTION**  
DISPLAYS ALL APPLE PLANS WHEN PARTICIPATING WITH MULTIPLE DISTRICTS OFFERING APPLE
  - **BENEFIT SUMMARY**  
DISPLAYS MULTIPLE APPLE PLAN ACCOUNT BALANCES WITH MULTIPLE DISTRICTS
  - **PARTICIPANT SUMMARY**  
DISPLAYS PERSONAL INFO AND 1 APPLE PLAN ACCOUNT BALANCE
  - **PASSWORD CHANGE**  
CHANGE OFTEN TO PROTECT YOUR ONLINE SECURITY
  - **ACCOUNT BALANCE**  
DISPLAYS ACCOUNT BALANCES IN PROFIT SHARING PLAN AND/OR MONEY PURCHASE PLAN
  - **PERSONAL INFO**  
CHANGE ADDRESS & OTHER PERSONAL DATA ONLINE
  - **GENERAL INFORMATION**  
BASIC INFORMATION ABOUT PARTICIPANT WEBSITE
  - **REPORTS**  
CREATE AND PRINT YOUR OWN STATEMENT OF ACCOUNT (LAST 2 PLAN YEARS)
  - **FORMS**  
PRINT RSA FORM & BENEFICIARY/CHANGE FORM
  - **ALL TRANSACTIONS BY FUND**  
CREATE & PRINT A TRANSACTIONS POSTED REPORT (LAST 2 PLAN YEARS)
- **FORMS-** SAME FORMS, DIFFERENT LOCATION
- **CUSTOMER SERVICE INQUIRES**  
HAVE A QUESTION? EMAIL A LIVE REP OR CALL CUSTOMER SERVICE
- **RETIREMENT PLANNING HOME - COMING SOON!**  
OTHER RETIREMENT PRODUCTS AND SERVICES OFFERED BY KEENAN