



## PLAN SPONSOR 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 ACCESS** – PLAN SPONSOR CHOICES
  - **LOGOUT**
  - **HOME (OR PLAN SELECTION)**  
DISPLAYS YOUR PLAN NAME AND POLICY NUMBER  
CLICK THE NAME OF YOUR PLAN TO ACCESS PLAN SUMMARY INFORMATION
  - **PLAN SUMMARY**  
DISPLAYS MULTIPLE APPLE PLAN ACCOUNT BALANCES WITH MULTIPLE DISTRICTS
  - **PLAN BALANCE**  
DISPLAYS CURRENT ENDING BALANCES BY SOURCE AND BY INVESTMENT AND THE NUMBER OF PARTICIPANTS WITH POSITIVE ACCOUNT BALANCES
  - **PASSWORD CHANGE**  
CHANGE OFTEN TO PROTECT YOUR DISTRICT'S ONLINE SECURITY
  - **REPORTS**  
CREATE AND PRINT PARTICIPANT STATEMENTS OF ACCOUNT, PLAN VALUATION REPORT, AND PLAN YEAR END REPORT (LAST 2 PLAN YEARS)
  - **FORMS**  
PRINT REQUEST FOR REFUND OF CONTRIBUTIONS FORM, ROLLOVER CONTRIBUTION FORM, RSA FORM, AND BENEFICIARY/CHANGE FORM
  - **ALL TRANSACTIONS BY FUND**  
CREATE & PRINT A TRANSACTIONS POSTED REPORT FOR THE PLAN OR SELECT A PARTICIPANT BY SSN (LAST 2 PLAN YEARS)
  - **WEB/VRU REQUESTS**  
DISPLAYS NUMBER OF TIMES PARTICIPANTS 'HIT' VARIOUS WEB SCREENS
  - **EMPLOYEES**  
YOUR LINK TO THE 'PARTICIPANT ACCESS' WEBSITE FOR THE SAME CAPABILITIES ILLUSTRATED ON THE PARTICIPANT WEBSITE FLYER, SIMPLY ENTER SSN AND OBTAIN INFORMATION AND ACCOUNT BALANCES
- **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