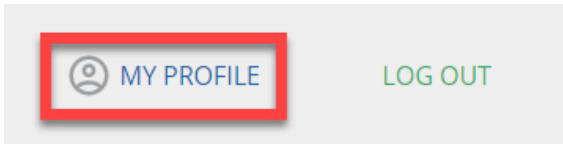


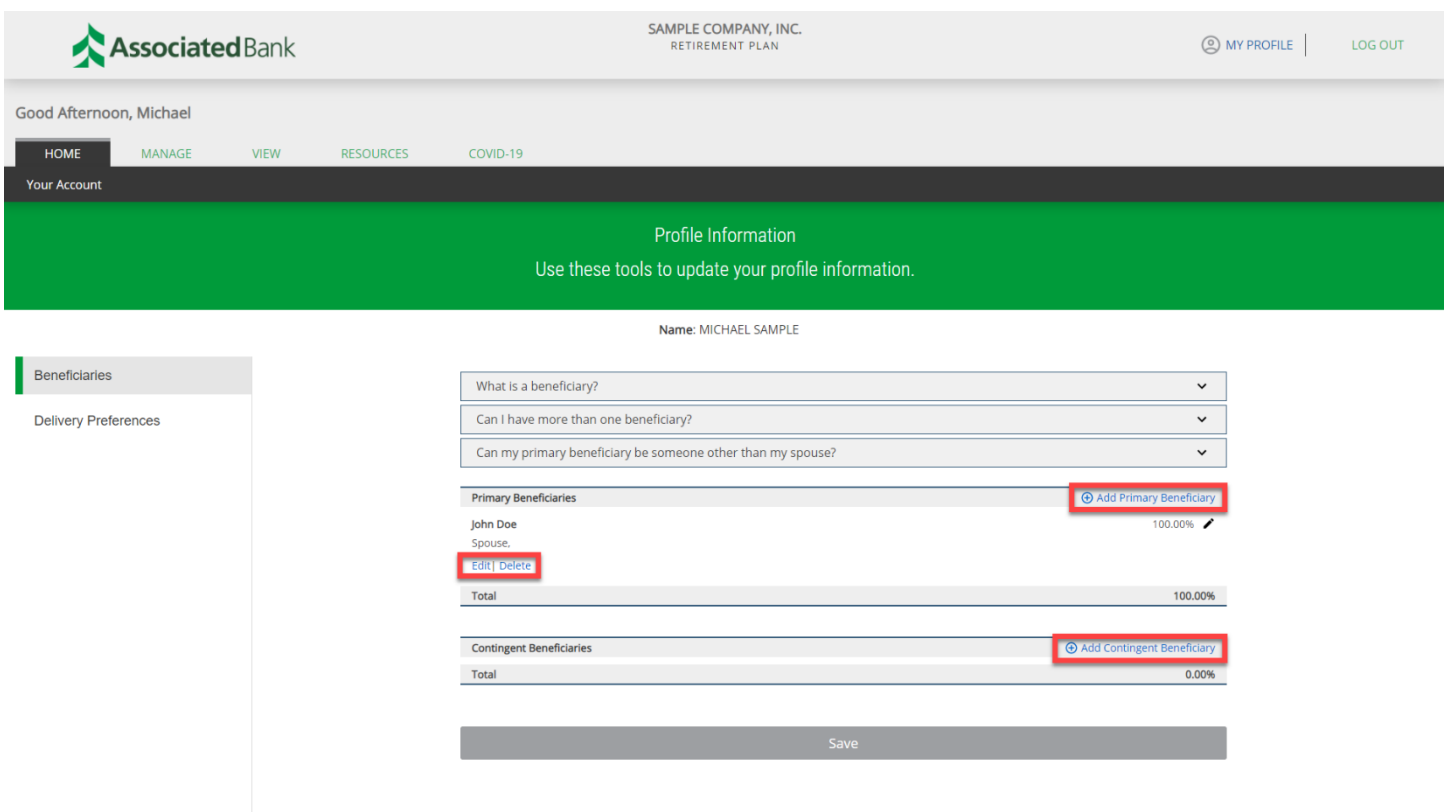
CREATE OR EDIT BENEFICIARY DESIGNATIONS

To add, change, or remove your primary and contingent beneficiaries for your retirement plan, click on the My Profile icon. This will automatically populate the Beneficiaries page where you will be able to enter and edit beneficiary information.



If you are married and are designating someone other than your spouse as your primary beneficiary, your spouse must consent in writing for this designation to be valid. Instructions for accessing a Beneficiary form are at the end of this document.

To add or edit your primary or contingent beneficiary information, click on the icon for the item you wish to add or edit.



Associated Bank

SAMPLE COMPANY, INC.
RETIREMENT PLAN

MY PROFILE | LOG OUT

Good Afternoon, Michael

HOME | MANAGE | VIEW | RESOURCES | COVID-19

Your Account

Profile Information
Use these tools to update your profile information.

Name: MICHAEL SAMPLE

What is a beneficiary?

Can I have more than one beneficiary?

Can my primary beneficiary be someone other than my spouse?

Primary Beneficiaries

John Doe
Spouse.
100.00%

[Add Primary Beneficiary](#)

[Edit](#) [Delete](#)

Total 100.00%

Contingent Beneficiaries

[Add Contingent Beneficiary](#)

Total 0.00%

Save

A screen will appear that will enable you to add or edit your beneficiary information. Enter percentages in whole numbers. Note: Percentages for primary and contingent beneficiaries must total 100%. The maximum number of primary and contingent beneficiaries is 100. The screen shot below is to "Add Primary Beneficiary." A similar screen will appear for contingent beneficiaries or editing beneficiary information.

Once you've created/edited your beneficiary information, click Save to save your changes.

Name: MICHAEL SAMPLE



What is a beneficiary?	▼
Can I have more than one beneficiary?	▼
Can my primary beneficiary be someone other than my spouse?	▼

Primary Beneficiaries	+ Add Primary Beneficiary
John Doe Spouse, Edit Delete	100.00% 
Total	100.00%

Contingent Beneficiaries	+ Add Contingent Beneficiary
Total	0.00%

Primary

☐ This Beneficiary Is a Trust/Estate/Charity

☐ Foreign Address

Allocation Percentage (Required)

%

Relationship (Required)

Select ▼

First Name (Required)

Middle Initial

Last Name (Required)

Social Security Number

If the beneficiary is a Trust, Estate, or a Charity, check the corresponding box to fill in the information needed. Note: If Tax ID/EIN is unknown, use last 4-digits of your social security number. Name of Trust/Estate/Charity is limited to 39 characters, abbreviate as needed. If known, add a person's contact name to Address 1 field.

Primary

☒ This Beneficiary Is a Trust/Estate/Charity

☐ Foreign Address

Allocation Percentage (Required)

%

Name of Trust/Estate/Charity (Required - Limited to 39 characters, abbreviate as needed)

Tax ID/EIN (Required)

Confirm Tax ID/EIN (Required)

Trust Date

Address 1

Address 2

City/APO/FPO/DPO

State/Province

None

ZIP Code

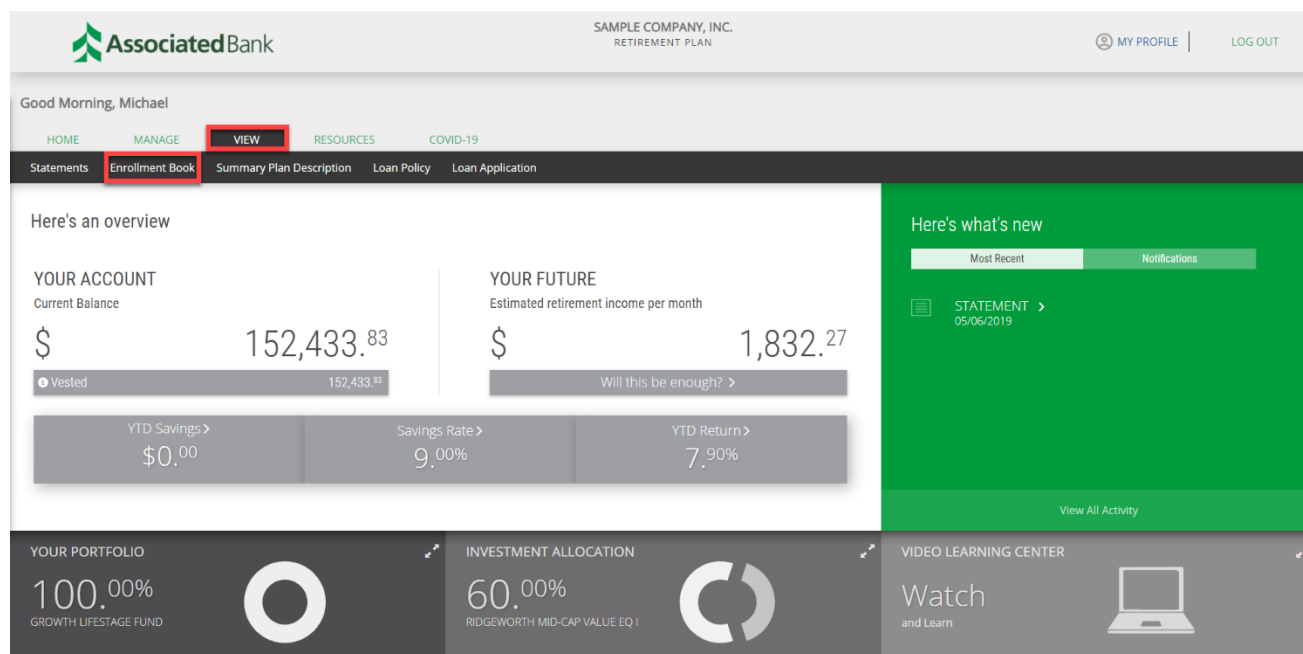
Country (Required)

United States

Phone Number

Once you've created/edited your beneficiary information, click Save to save your changes.

To add a primary beneficiary other than your spouse, you will need to download a Beneficiary form. To access a Beneficiary form, place your cursor over the View tab and click on Enrollment Book in the menu below.



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SAMPLE COMPANY, INC.
RETIREMENT PLAN

Good Morning, Michael

HOME MANAGE **VIEW** RESOURCES COVID-19

Statements **Enrollment Book** Summary Plan Description Loan Policy Loan Application

Here's an overview

YOUR ACCOUNT
Current Balance
\$ 152,433.⁸³
Vested 152,433.⁸³

YOUR FUTURE
Estimated retirement income per month
\$ 1,832.²⁷
Will this be enough? >

YTD Savings > \$0.00 Savings Rate > 9.00% YTD Return > 7.90%

Here's what's new

Most Recent Notifications

STATEMENT > 05/06/2019

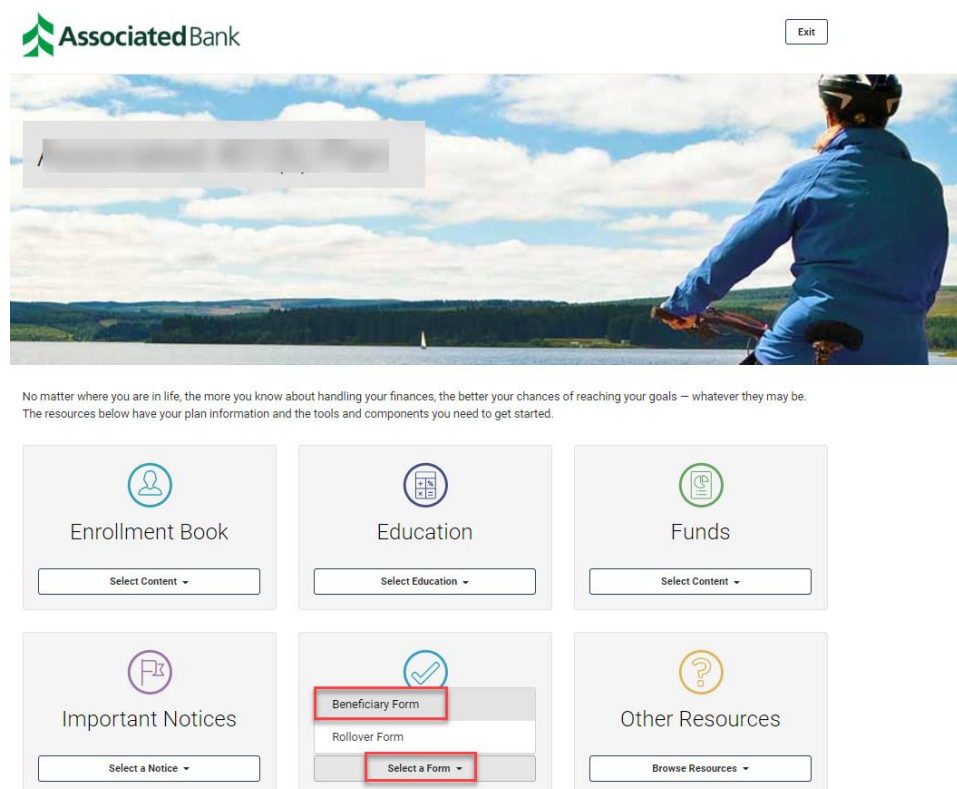
View All Activity

YOUR PORTFOLIO
100.00%
GROWTH LIFESTAGE FUND

INVESTMENT ALLOCATION
60.00%
RIDGEWORTH MID-CAP VALUE EQ I

VIDEO LEARNING CENTER
Watch and Learn

An enrollment book window will open. Click on forms to download and print a copy of the Beneficiary form. Complete this form and return this completed form to your HR or Benefits representative.



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Exit

No matter where you are in life, the more you know about handling your finances, the better your chances of reaching your goals – whatever they may be. The resources below have your plan information and the tools and components you need to get started.

Enrollment Book
Select Content

Education
Select Education

Funds
Select Content

Important Notices
Select a Notice

Beneficiary Form
Rollover Form
Select a Form

Other Resources
Browse Resources

NOTE: An email or paper confirmation will be generated depending on the mail confirm election.

If you have any questions, please call our Customer Care team at 800-431-4649.



Contact Us

Call our Midwest-based Customer Care Center at 800-431-4649

Visit Retirement.AssociatedBank.com



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NOT FDIC INSURED	NOT BANK GUARANTEED	MAY LOSE VALUE	NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY	NOT A DEPOSIT
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