ACCOUNT ACCESS

RETIREMENT SPONSOR WEBSITE

ALERUS

- Go to **alerusrb.com**, click **Log in,** select **Employer Access**, click **Go**.
- We recommend bookmarking this page for future reference.
- Sign in using the credentials you created during your inital log in.
- Select **Plan Access** and click the applicable Plan ID.

Manage My Plan

Summary

- Monitor alerts for timely updates and notices
- At-a-glance summary of plan assets, last contribution, plan participation, web usage, and participant balances by age

Plan Features

- Highlights features in the plan and the next scheduled realignment dates

Balances

- View by investment, source, and 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 Summary

- 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, SSN, or by status
- Edit participant information (address or 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 view or download participant statements

Manage My Files

Retrieve Files

- Use the **File Type** drop-down menu to download files and reports (eligibility, previously submitted files, and requested reports)
- Use the **Payroll Reports** drop-down to retrieve weekly files, including new loans, rate changes, and new enrollees

Submit Files

- Use the **File Type** drop-down menu to upload confidential information, enter description of the file, and attach document

View Logs

- View transations and web activity

Request Reports

- Request reports to help manage the plan

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Trust services: 1) not FDIC insured 2) not guaranteed by bank, 3) may lose value.