24/7 ACCOUNT ACCESS

WEBSITE ACCOUNT ACCESS

1. Go to **alerusrb.com** and click **Login**.
2. The first time you log in, you will need to create an account. Click **Sign Up** or **Create Account**. You will need your Social Security Number and Date of Birth. You will also need one of the following:
   - Alerus Bank Account Number
   - Alerus Bank Debit Card Number
   - Alerus Retirement and Benefits Hire Date
   - Alerus Retirement Plan Number
3. Next, you will be presented with an electronic consent form and terms and conditions. Click **Accept**.
4. On the next page, select a phone number and your preferred method of authentication (text or call). Ensure the information is correct and click **Submit**.
5. Enter the six-digit code sent via text or call and click **Submit.**

Note: To reach your retirement account from the MY ALERUS dashboard, select your plan under **Accounts** and click any of the Q**uick Links**.

SUMMARY
- View customized alerts regarding your plan or your company.
- Access high-level, "at-a-glance" summary information.
  - Year-to-date Account Balance
  - Personal Rate of Return
  - Balance History
- Use calculators to help plan your retirement.
- Download the most recent **Future Focus** newsletter.
- View name, address, and profile information, and activate online statements in **My Profile**.

MY BALANCE
- View balance by investment, source, or asset class.
- Query an activity summary by investment or source.
- Download your account history directly to Quicken or in a universal CSV format.

MY CONTRIBUTIONS
- **Contribution Summary** provides:
  - "At-a-glance" contribution history, by source, for each year with Alerus.
  - Your year-to-date contributions by source.
- Click on **Contribution Investments** to view how your future contributions are being invested.

CHANGE MY INVESTMENTS
Use step-by-step instructions to:
- Change how future contributions are invested.
- Change how your current account balance is invested.
- Transfer specific amounts.
- Establish a schedule to automatically rebalance your account.
- View pending transactions.

INVESTMENT PERFORMANCE
- View **Personal Rate of Return** for stated time frames or a specific date range.
- Access fund performance, expense ratios, and prospectuses.
- Search for investments prices by date, or simply view the daily price.
- View timely updates on current market events and financial news.

MY DOCUMENTS
- Retrieve copies of your quarterly personal statements.
- View the confirmation of activity you initiated in your account.

CHANGE MY CONTRIBUTIONS, **LOAN CENTER**, and/or **DISTRIBUTION CENTER** will show if your plan allows the feature.

TELEPHONE ACCOUNT ACCESS

1. Call 800.795.2697.
2. Enter your Social Security Number (SSN).
3. Enter your PIN, the default PIN is the last four digits of your SSN, plus the last two digits of your birth year.
4. Navigate by following the prompts:
   - Press 1 for account information/changes.
   - Press 2 for loans.
   - Press 3 for investment pricing.
   - Press 6 to change your PIN.

Questions? Our client service associates are eager to assist you Monday through Friday, 7 a.m. to 6 p.m., Central time at 800.433.1685.

ALERUS