PensionTrend Web Access

Account Information at your Fingertips

You will have full access to your account via PensionTrend's website. This service is available to you 24 hours a day.

To Access your Account via the Internet:

- Go to **www.pensiontrend.com**
- Click on Account Access
- User ID = your 9 digit Social Security Number with no dashes or spaces
- Password = last four digits of your Social Security number
  (you should change this password on your first visit)
- If you are unsuccessful logging in, run the compatibility test at the bottom of the screen
- **Be sure to logout upon completion of your transaction**

Web Access Features

Screen	***Features***
Account Summary	- Summary of account balance, vested balance and personal information on file
Password Change	- Follow the prompts to change your user ID and password
Account Balance	- Provides balance information by investment and source
Allocation of Future…	- Shows how future deposits will be allocated to your account
Transfer Single Fund	- Allows you to transfer money from one fund at a time
Rebalance Portfolio	- Reallocates holdings to match your current Investment Elections
Conform to Target	- Allows you to reallocate your entire account balance
Model Loans (if allowed)	- Create loan models before requesting loan from the plan. Loan requests must be made directly to company contact
Transactions	- Provides a complete listing of account transactions

Account Access by Phone

To access your account you will need a touch-tone phone

1. Dial **1-866-349-2149**
2. Enter your Social Security number
3. Enter your PIN followed by the (#) key –
   Initially your PIN will be the last four digits of your Social Security number
4. Select an account to review

Options Menu – Touch the number below for the following information:

1. **Personal Account Information**
    1. Account Balance Information
    2. Investment Information
    3. Investment Transfers
    4. Conform Ending Balances (rebalances all accounts to your investment election on file)

2. **Change your Personal Identification Number (PIN)**