

Easy Access to Your Account

First-Time Users

- Go to www.divinvest.com
- Click on “Sign in to Your Account” then “Diversified DirectSM Online”
- Click on “Get Started” and follow the instructions to establish a password and access your account

Frequent Users

- Go to www.divinvest.com
- Click on “Sign in to Your Account” then “Diversified Direct Online”
- Enter your Social Security number or Customer ID, and password
- From the welcome page, click on “Access Account(s)” and select the account you wish to access



Enroll in the Plan

- From the welcome page, select “Begin your Plan of a Lifetime”
- Enter your information
Confirmation mailed the following business day.

Change Contribution Amount

- From the main menu, select “Transactions”
- Select “Deferrals”
- Enter updates
Confirmation mailed the following business day.

Review Plan Information

- From the main menu, select “Account Information”
- Select “About the Plan”

Check Account Balance

- From the main menu, select “Account Information” (brought up automatically if you are enrolled)
- Full summary available

Change Investment Allocation *(new contributions)*

- From the main menu, select “Transactions”
- Select “Allocations”
- Enter updates
Confirmation mailed the following business day.

Customer Service

- From the main menu, select “Help” (upper right corner)

Review Investment Performance

- From the main menu, select “Account History”
- Select “Fund Performance”

Transfer Between Investment Options *(existing assets)*

- From the main menu, select “Transactions”
- Select “Fund Transfers”
- Enter updates
Confirmation mailed the following business day.

Easy Access to Your Account

First-Time Callers

- Call **800-755-5801**
- Enter your Social Security number
- Follow the prompts for creating your Personal Identification Number (PIN)

Frequent Callers

- Call **800-755-5801**
- Enter or say your Social Security number
- Choose the account you wish to access
- Enter or say your PIN



Enroll in the Plan

- Say “Allocation”
- State the percentage you wish to invest in each fund
- Say “Deferral”
- State the appropriate percentage/amount
Confirmation mailed the following business day.

Change Contribution Amount

- Say “Change my account”
- Say “Deferral amount”
- Provide updates to contribution amount
Confirmation mailed the following business day.

Review Plan Information

- Say “Speak to a counselor”
- Counselor will review specific plan information

Check Account Balance

- Account balance automatically offered
- For account balance by fund, say “Account information,” then “Balances”

Change Investment Allocation *(new contributions)*

- Say “Change my account”
- Say “Future allocation”
- Provide updates to investment allocation
Confirmation mailed the following business day.

Customer Service

- Say “Speak to a counselor”

Review Investment Performance

- Say “Hear account information”
- Say “Fund information,” then “Performance”

Transfer Between Investment Options *(existing assets)*

- Say “Change my account”
- Say “Transfer current assets”
- Provide transfer information
Confirmation mailed the following business day.

Go green, save trees. Sign up online for e-statements today!

Securities offered through Diversified Investors Securities Corp. (DISC), 4 Manhattanville Road, Purchase, NY 10577. Diversified and DISC are affiliated companies.

