RANDALL & HURLEY, INC.
Pension and Employee Benefits

Participant Web Preferences Form

This form allows you to control the online settings available to participants in your plan. These options can be changed at any time with adequate notice. Please contact Beth Elfering (belfering@randall-hurley.com) or April Anderson (aanderson@randall-hurley.com) with any questions.

Plan Name: ______________________________

Authorized Signature of Person Completing Form: ______________________________

	Requested Settings
Account Balance & Investment Elections	
Provide Account Balance in Units	☐
Show Average Cost Basis	☐
Display Current Elections	☐
Allow Updates to Investment Elections	☐
Transaction Fee	$________
Minimum Percent	________%
Minimum Percentage Increment (%)	________%
Contributions	
Provide Current Contribution Rate	☐
Allow Contribution Changes via Web	☐
Transaction Fee	$________
Minimum Percent	________%
Maximum Percent	________%
Minimum Percentage Increment (%)	________%
Minimum Dollar Amount	$________
Minimum Dollar Increment ($)	$________
Types of Change Allowed (circle all that apply)	% $ Both
Display Last Contribution Change Made via Web	☐
Transfers & Loans – Transaction Options	
Allow Transfers	☐
Transaction Fee	$________
Allow Fund to Fund Transfers	☐
Allow Transfer to Election Percent Transfers	☐
Allow Transfer to Target Percent Transfers	☐
Allow Transfers for Dollars to Percents ($ to %)	☐
Allow Transfers for Dollars to Dollars ($ to $)	☐
Allow Transfers for Percents to Percents (% to %)	☐
Allow Users to Create Recurring Rebalance Transfers	☐
Allow Loan Modeling	☐
Provide Existing Loan Information	☐
Allow New Requests Online	☐
Withdrawals	
Allow Withdrawal Requests	☐
Transaction Fee	$________
Types of Distributions Allowed (circle all that apply)	Hardship In-Service
Participant Additional Options	
Allow Participants to Email Company	☐
Show Retirement Calculator	☐
Allow New Participants to Enroll (with password)	☐
Transaction History	
Allow Users to Search for Past Transactions	☐
Show VRU/Online History	☐
Allow Transaction History Export	☐

Participant Summary Display	
Show Address	☐
Show Birth Date	☐
Show Marital Status	☐
Show Vested Balance	☐
Show Hire Date	☐
Show Entry Date	☐
Show Company Officer (Y/N)	☐
Show Percentage of Voting Stock Owned	☐
Show Contribution Amount (per pay period)	☐
Show Beneficiary Information	☐
Investment Information	
Display Asset Class	☐
Display Risk Level	☐
Display Redemption Fee Data	☐
Show Prospectus for Each Fund	☐
Personal Information	
Allow Edit of Name	☐
Allow Edit of Address	☐
Allow Edit of Birth Date	☐
Allow Edit of Marital Status	☐
Allow Edit of Gender	☐
Allow Edit of Home Phone	☐
Allow Edit of Office Phone	☐
Allow Edit of Other Phone	☐
Allow Edit of Home Email	☐
Allow Edit of Office Email	☐
Allow Edit of Other Email	☐
Set Up Email Notification	☐
Set Up Alternate Verification (in case of password loss)	☐
Personal Rates of Return	
Display Monthly Returns	☐ for ______ months
Display Quarterly Returns	☐ for ______ quarters
Display Annual Returns	☐ for ______ years
Display Total Rate of Return for Each Period	
Reports & Forms	
Allow Participants to View Reports You Specify *Provide a description of the reports to be available:*	☐
Allow Participants to Create On-Demand Reports	☐
Allow Participants to Elect to Receive E-Statements	☐
Allow Participants to View & Print Forms You Specify *Provide a description of the forms to be available:*	☐
Company Notification	
Send Email Notice of Personal Information Changes	☐
Send Email Notice of Investment Election Changes	☐
Send Email Notice of Beneficiary Changes	☐
Send Email Notice of Contribution Amount Changes	☐
Send Email Notice of Distribution Requests	☐
Send Email Notice of New Loan Requests	☐
Send Email Notice of Transfers	☐
Send Email Notice of VRU PIN Change	☐
Send Email Notice of Web Password Change	☐
Notice should be sent to the following email address:	
Custom Links & Future Enhancements	
Custom Links to Outside Websites (please specify):	
Custom Links to Other Information (HTML, general information or electronic documents):	
Custom Links to Additional Email Addresses:	
Describe Any Enhancements You Would Like to See Developed in the Future:	