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## MOBILE APP - INTRODUCTION

Randall + Hurley Mobile App

Randall + Hurley is pleased to announce the launch of its mobile phone app, "Randall + Hurley", for both iOS and Android operating systems. The app will provide participants with "on-the-go" information that includes balance, current contribution, allocation, investment, and personal details as well as the function to elect a new contribution rate or amount.

### WHAT YOU WILL NEED

#### A supported device

- Android - API Level 19 (KitKat) +
- iOS 11.0 +

#### Randall + Hurley Credentials

- Portal user name and password with current email or cell phone contact details to receive MFA - Multi Factor Authentication  
OTP - One Time Pin

#### No user name / password / contact details

- Contact your HR department to update your personal information or
- Contact us at 1-877-895-5146 if you need assistance updating your profile.





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## MOBILE APP - FEATURES SUMMARY

Randall + Hurley Mobile App

### WITH THE RANDALL + HURLEY APP, YOU CAN

- Enable biometric authentication during sign-on (e.g., fingerprint usage)
- Enroll if your plan requires automatic enrollment and you are using the app as your first logon
- Switch Plans if you are enrolled in more than one plan.
- Receive messages from Randall + Hurley.
- Messages can be enabled to be pushed as a notification if set to allow.

### WITH THE RANDALL + HURLEY APP, YOU CAN VIEW YOUR

- Balance
- Current contribution rate / amount
- Investment elections
- Investments
- Account Sources (i.e. Employee Pretax / Roth / Employer Contribution)
- Current Loan balance
- Rate of returns
- Personal Details

### WITH THE RANDALL + HURLEY APP, YOU CAN CHANGE YOUR

- Contribution rate / amount
- Username
- Password

### WITH THE RANDALL + HURLEY APP, YOU DO NOT HAVE ACCESS TO

- Loan Application (Plan Specific)
- Distribution Application (Plan Specific)
- Statements
- Forms
- Documents



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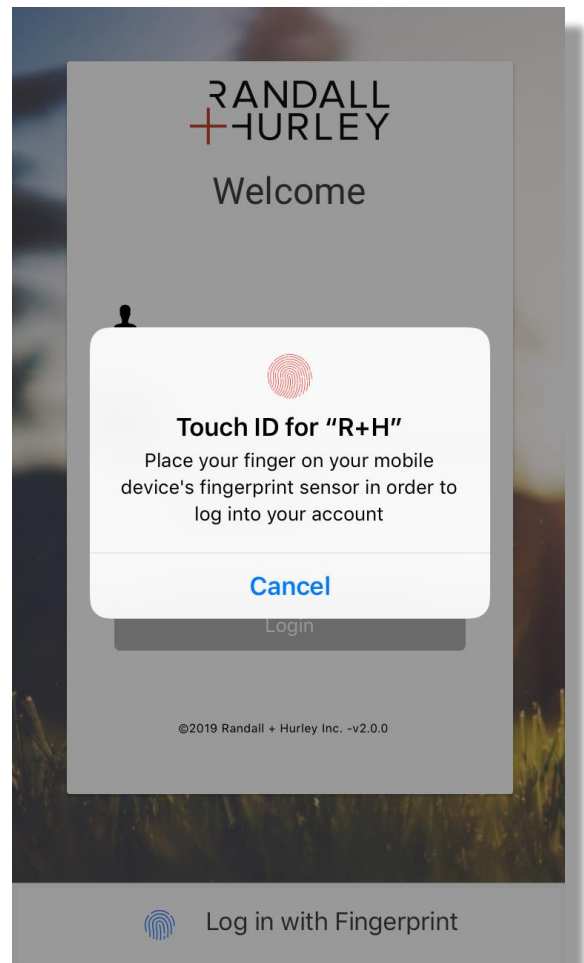
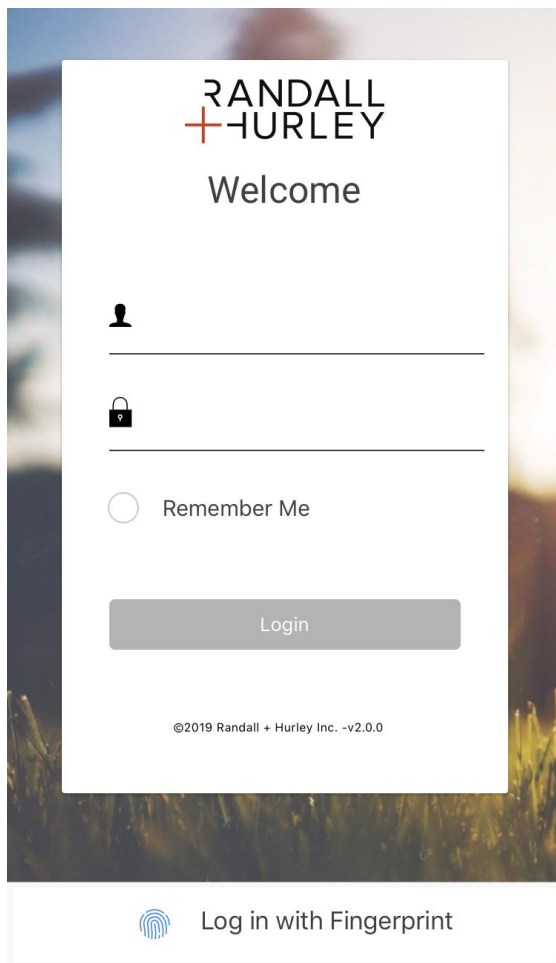
## MOBILE APP - FEATURES

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### BIOMETRIC AUTHENTICATION

- Biometric authentication during sign-on (e.g., fingerprint usage) can be turned on at the participant level and used to bypass providing username and password on the login screen. This option requires you to first login using your username and password to turn on this feature.

*NOTE: Biometric authentication uses the technology native to the mobile device. Anyone who has been granted biometric access on your mobile device will be able to utilize their biometric reference for access to the Relius Mobile App.*





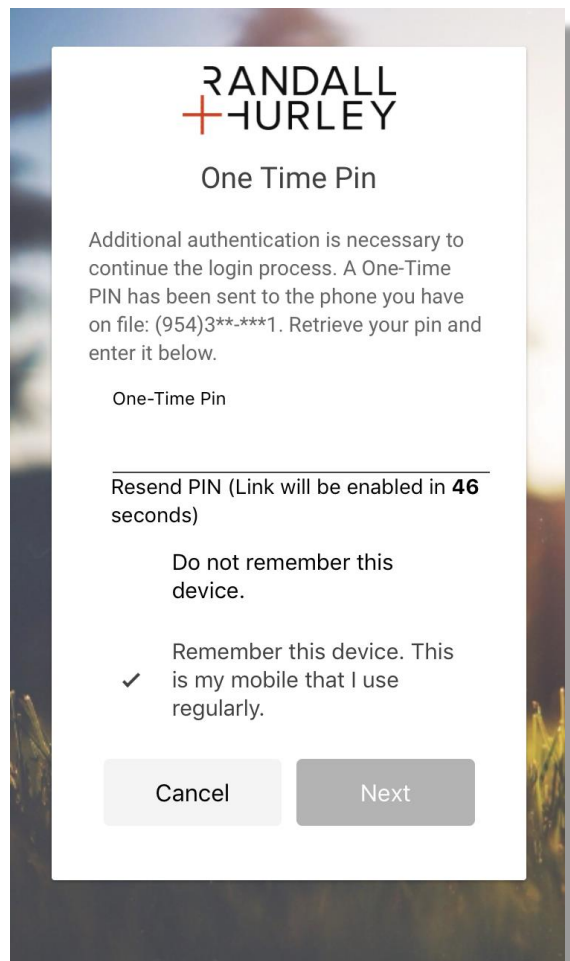
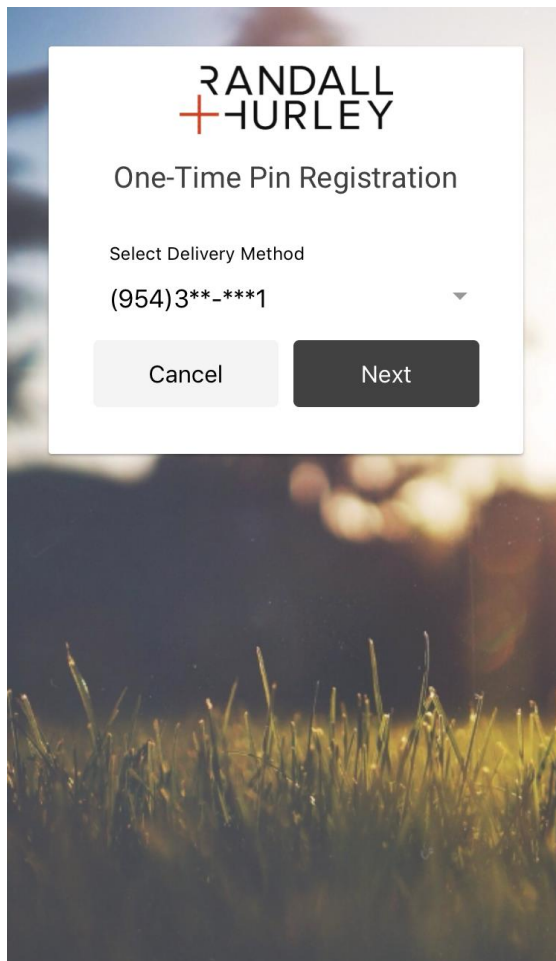
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## MOBILE APP - FEATURES

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### MULTI-FACTOR AUTHENTICATION / ONE TIME PIN

- The same one-time PIN rules that are set up for the plan are also applicable to access using the App





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## MOBILE APP - FEATURES

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### PLAN ENROLLMENT REQUIREMENTS

- If you are subject to automatic enrollment on the web, you will be redirected to the web portal to complete the enrollment process prior to accessing your plan on the App.

The screenshot shows the mobile app interface for the 'Sample Web Corporation 401(k) Plan'. At the top, the 'RANDALL + HURLEY' logo is displayed. Below the logo, the text 'Sample Web Corporation 401(k) Plan' is visible. The main heading is 'Enroll as a new user'. The body text instructs the user to login to their plan's website at <https://login.randall-hurley.com/secure/default.aspx> to complete enrollment. Below this text is a large, light gray 'Enroll' button. At the bottom of the screen, there is a 'Logout' link with an external link icon.



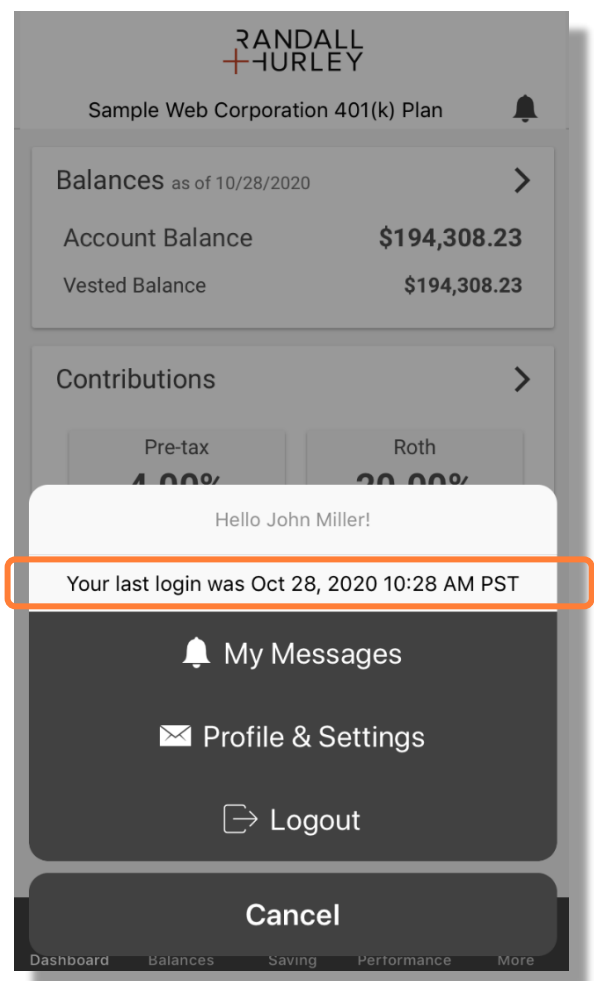
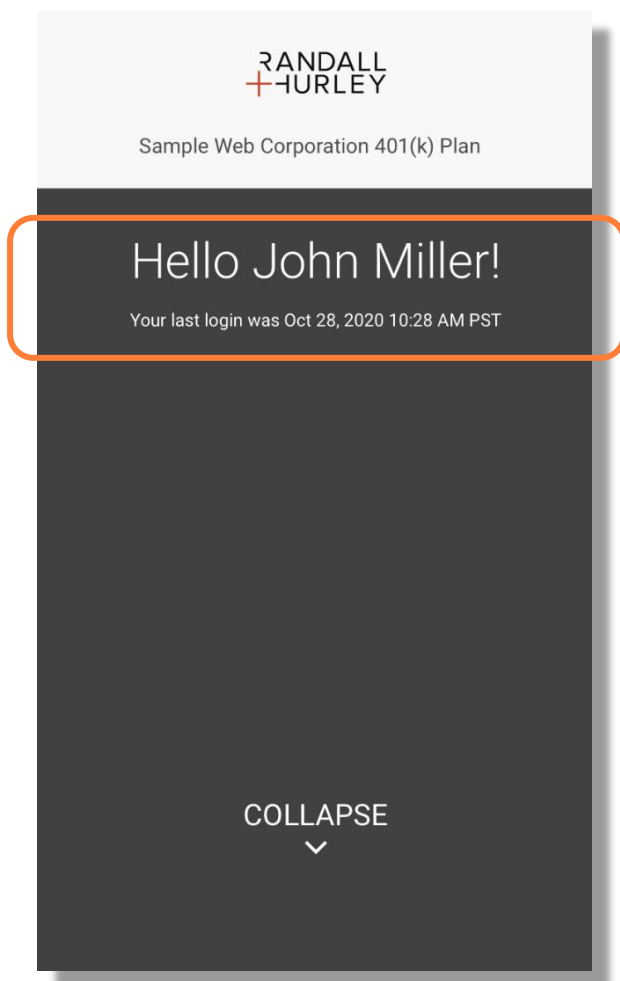
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## MOBILE APP - FEATURES

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### WELCOME BANNER WITH LAST LOGIN INFORMATION

- Upon login, you will see a Welcome banner with your name and last login date and time. This information can be accessed anytime from within the “More” menu.





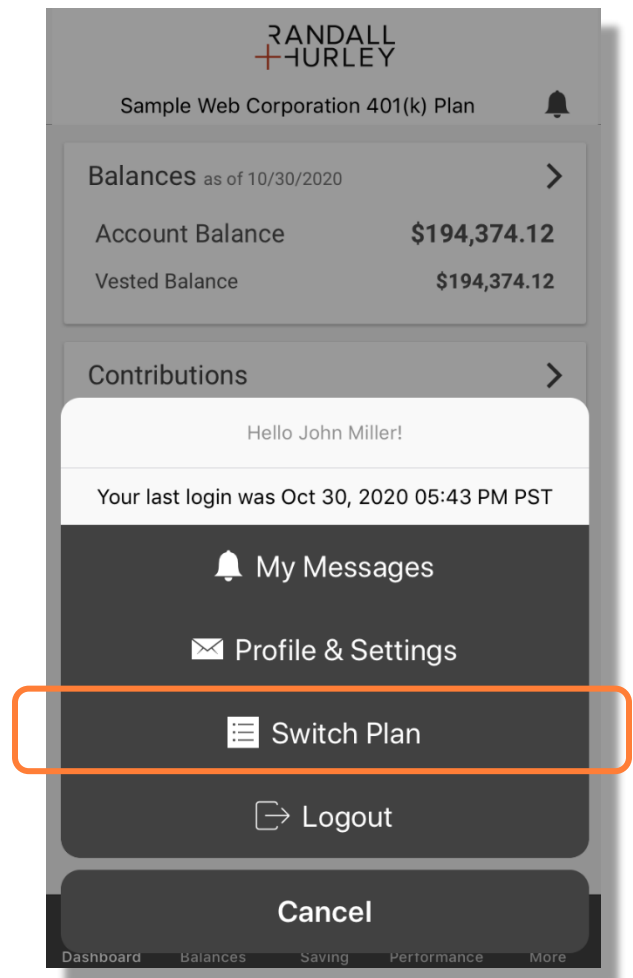
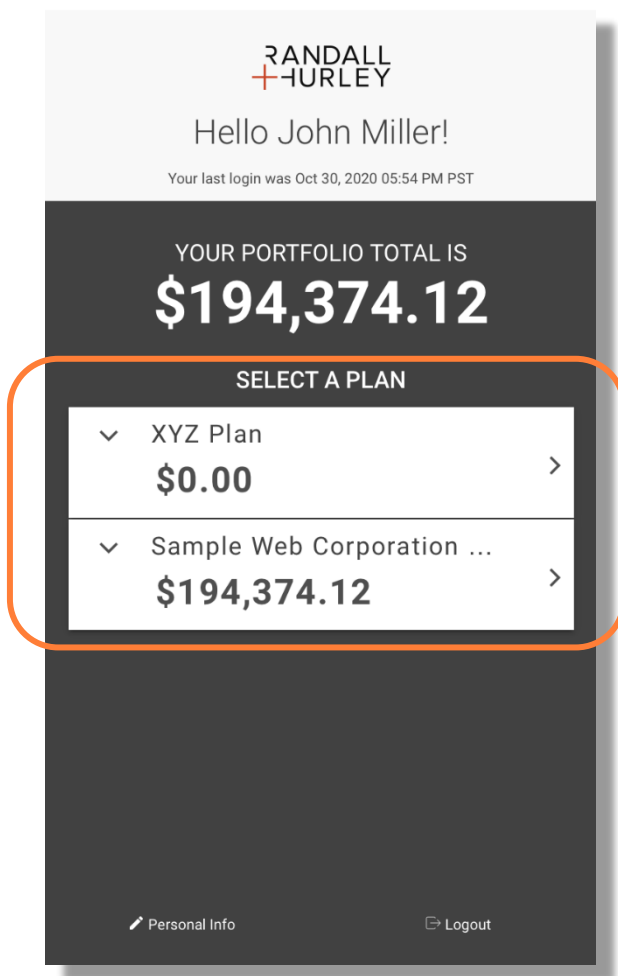
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## MOBILE APP - FEATURES

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### PLAN SELECTION

- When you have access to more than one plan, you will be directed to a plan selection page on which the desired plan is selected. You can later access other plans by selecting the “Switch Plan” menu item from within the “More” menu.





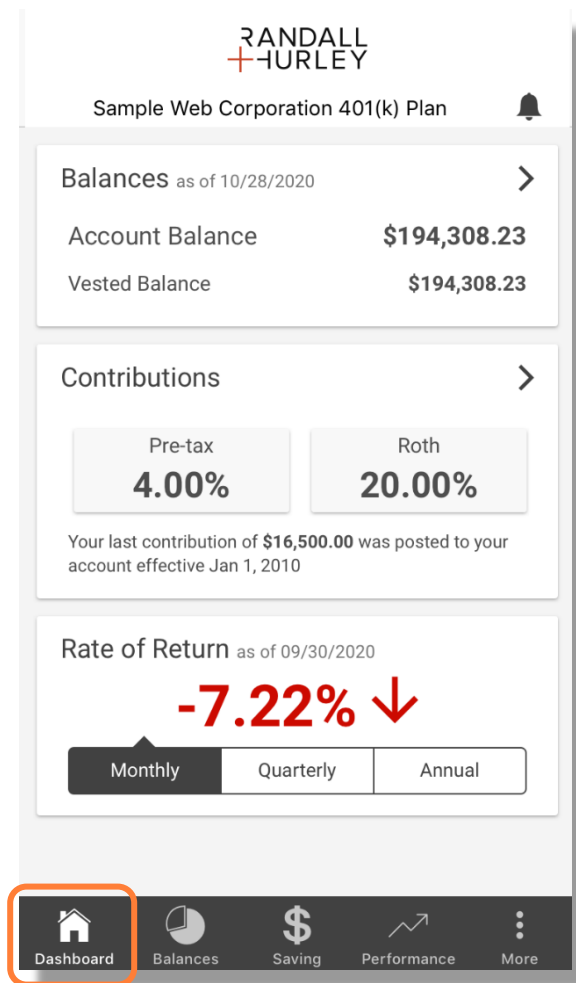
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## MOBILE APP - FEATURES

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### PLAN LEVEL DASHBOARD

- The plan level dashboard has three widgets: Balances, Contributions & Personal Rate of Return.
- The balance widget provides the balance and vested balance. This panel can be selected to open the dedicated balance page on the App.
- The contribution widget provides the contribution rate elections. Selecting this panel opens the dedicated contribution information page on the App.
- The personal rate of return will display your total personal rate of return for the past month, quarter and year time frames.







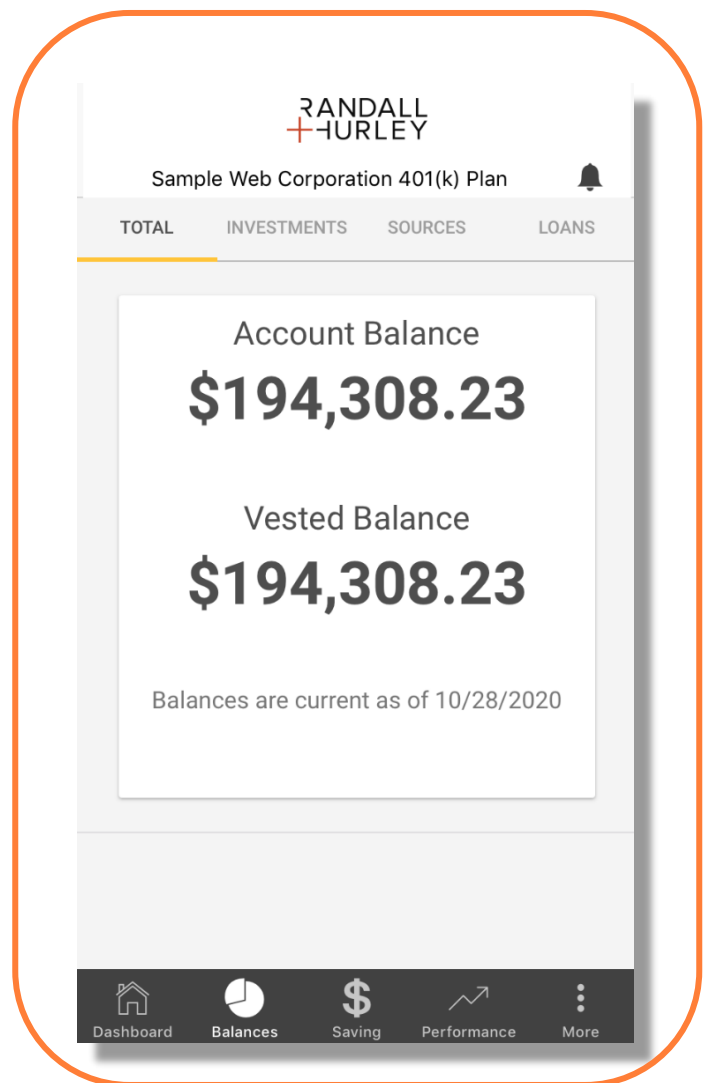
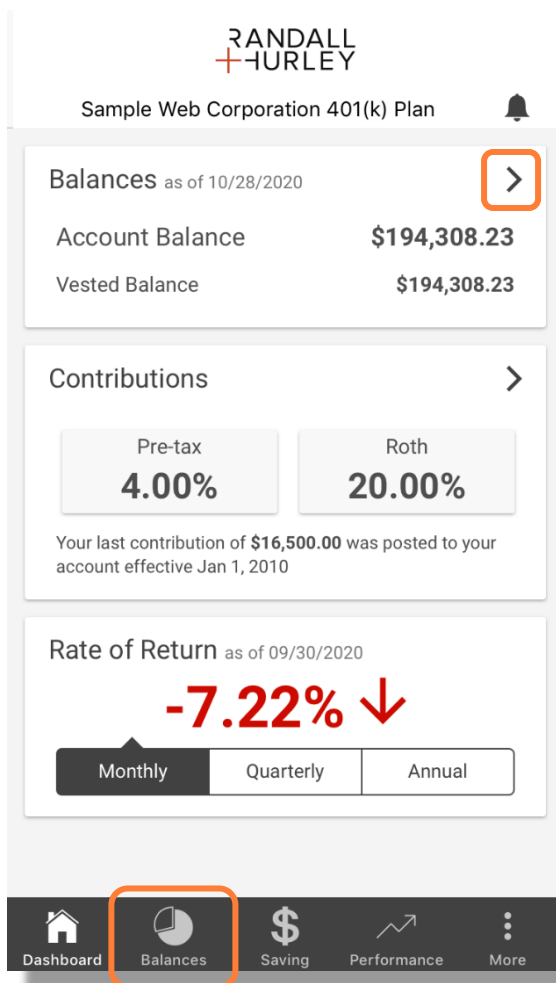
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## MOBILE APP - FEATURES

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### BALANCES

- The dedicated balances page has four views: total balances, balances by investment, balances by source and balances by loan. This page can be accessed by clicking "Balances" on the menu bar or by selecting the balances panel from within the dashboard.





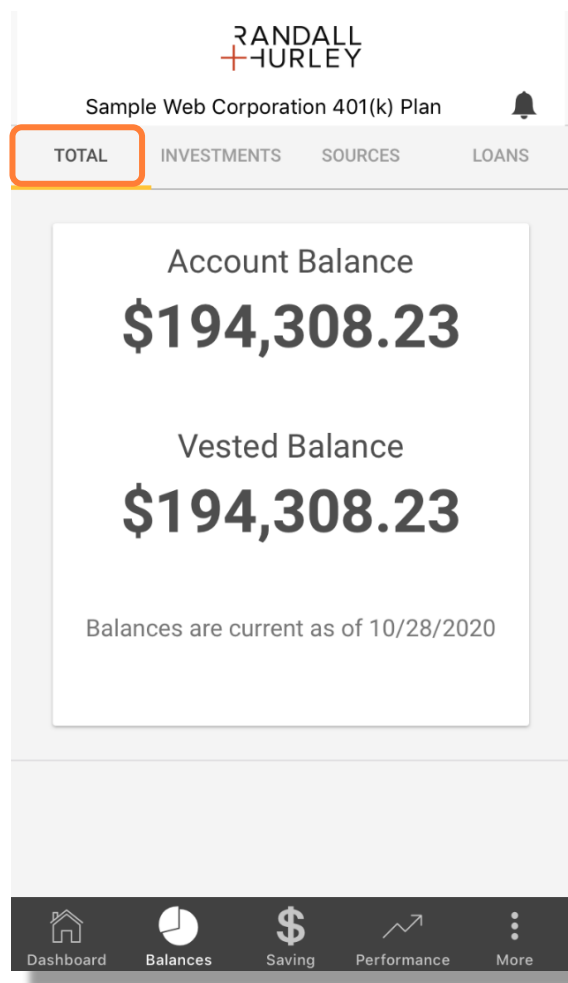
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## MOBILE APP - FEATURES

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### TOTAL BALANCES

- This view displays the total balance (the same as on the dashboard). It serves as the landing view for the balances page. You can navigate to the other balance views by selecting the links at the top of the form or by swiping left or right.





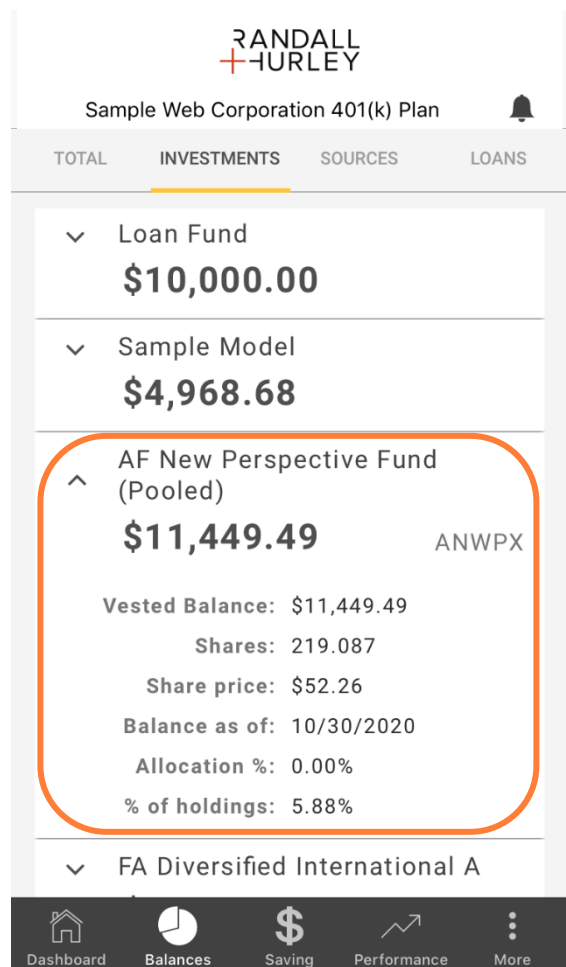
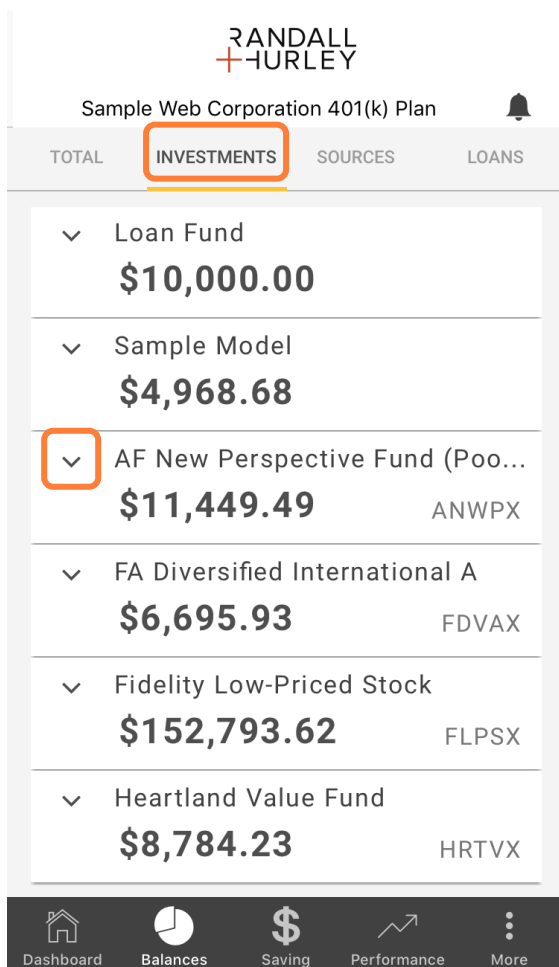
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### BALANCES BY INVESTMENT

- This view displays the balance for each investment. You can select a panel for the investment to view additional information:
  - Fund identifier
  - Vested balance
  - Shares
  - Share price
  - As of date
  - Allocation % (this is the portion of payroll directed into the investment)
  - % of holdings (portion of entire balance that is invested in the fund)





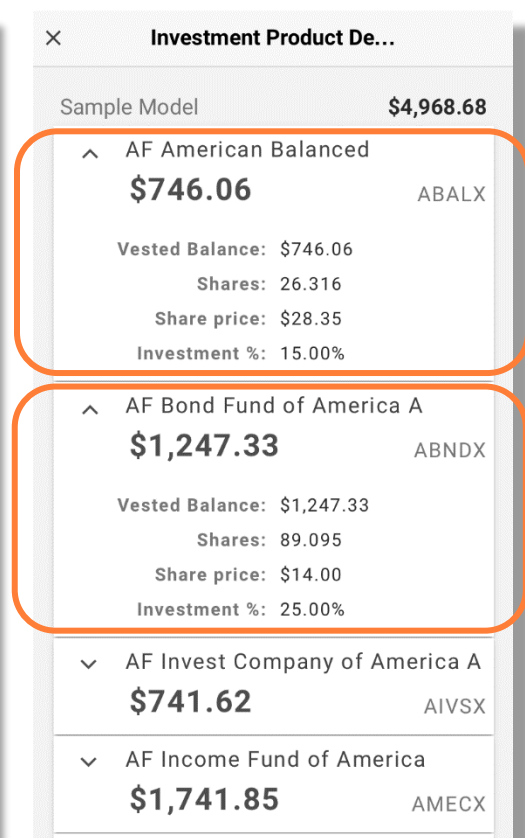
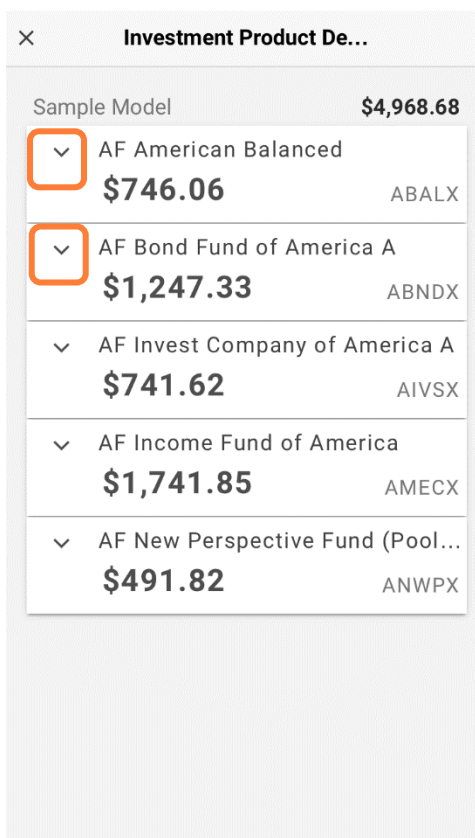
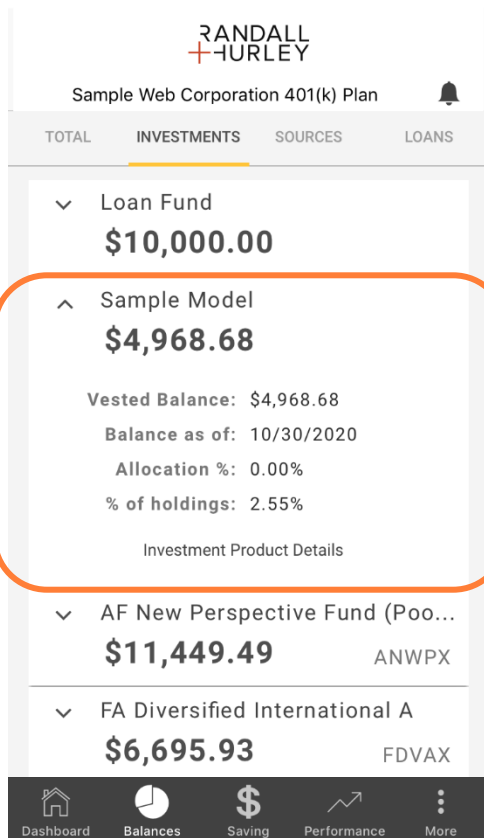
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## MOBILE APP - FEATURES

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### INVESTMENT PRODUCT DETAILS

- If the investment is an investment product, an investment product details link on the balance by investment detail view will open an investment product detail form that will allow you to see details about the investment product. This shows the balance in each underlying investment in a panel that will expand to show the vested balance, shares, share price, and investment % for each underlying investment.



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509 838 5500 | 888 682 4406  
828 Great Northern Blvd, Helena, MT 59601  
406 449 5500 | 800 765 9429



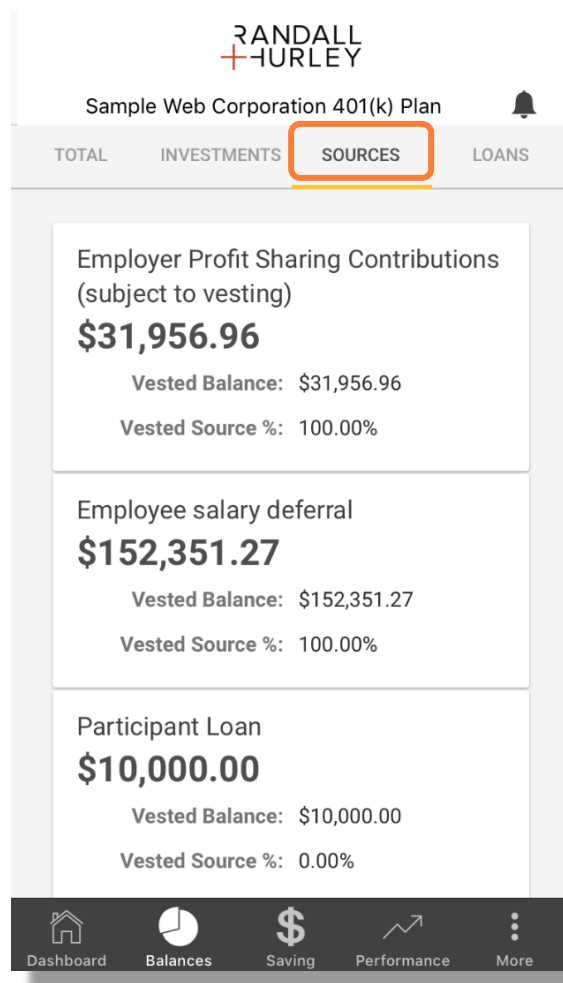
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## MOBILE APP - FEATURES

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### BALANCE BY SOURCE

- The balance by source view identifies the total balance within the source as well as the vested balance and the accrued vested % of the source.





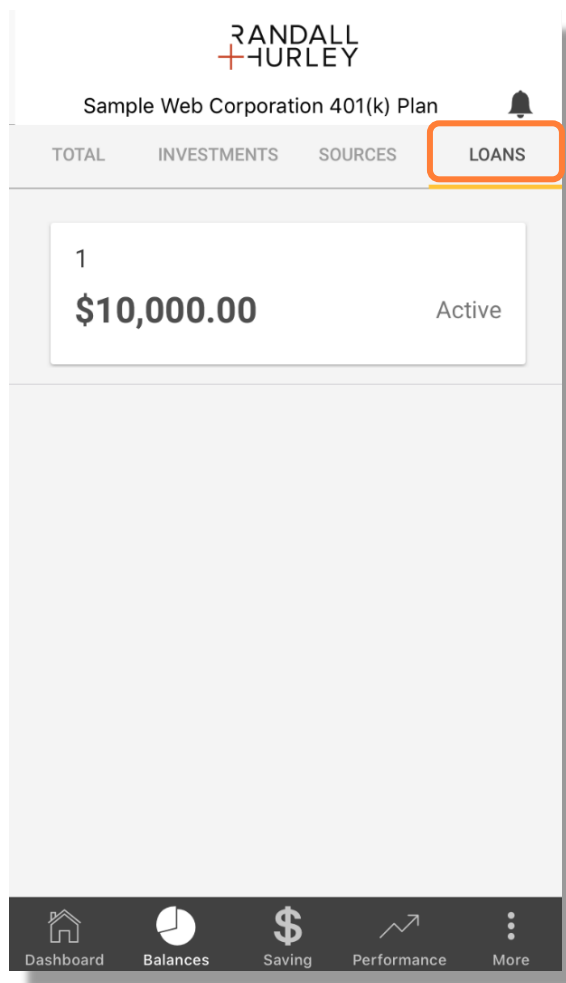
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## MOBILE APP - FEATURES

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### BALANCE BY LOAN

- This view identifies the balance and status of each outstanding loan.





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## MOBILE APP - FEATURES

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### SAVINGS

- This form provides information about savings rates and investment directions for new investments. You can change contribution rates from within the contribution amount tab. It can be accessed by selecting the Savings icon on the menu bar or by selecting the Contributions panel from within the dashboard. The form has two views: Contribution Amount and Contribution Investments.

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Sample Web Corporation 401(k) Plan

**Balances** as of 10/28/2020

Account Balance	\$194,308.23
Vested Balance	\$194,308.23

**Contributions**

Pre-tax 4.00%	Roth 20.00%
------------------	----------------

Your last contribution of \$16,500.00 was posted to your account effective Jan 1, 2010

**Rate of Return** as of 09/30/2020

**-7.22% ↓**

Monthly | Quarterly | Annual

Dashboard | Balances | **Saving** | Performance | More

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Sample Web Corporation 401(k) Plan

CONTRIBUTION AMOUNT | **CONTRIBUTION INVESTMENTS**

Pre-tax	4.00%
Roth	20.00%

**Change Contributions**

Dashboard | Balances | **Saving** | Performance | More



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## MOBILE APP - FEATURES

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### CONTRIBUTION AMOUNT

- This form displays the savings rate or amount per money type. This tab will also include an option to create a contribution rate change transaction. Each money type panel can be expanded to see recent contribution information. The historical contributions shown here may either be from payroll or from posted transactions.

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Sample Web Corporation 401(k) Plan

CONTRIBUTION AMOUNT | CONTRIBUTION INVESTMENTS

Pre-tax 4.00%

Roth 20.00%

Change Contributions

Dashboard Balances Saving Performance More

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Sample Web Corporation 401(k) Plan

CONTRIBUTION AMOUNT | CONTRIBUTION INVESTMENTS

Pre-tax 4.00%

Recent Contributions

\$0.00 | \$0.00  
30-day

Roth 20.00%

Change Contributions

Dashboard Balances Saving Performance More





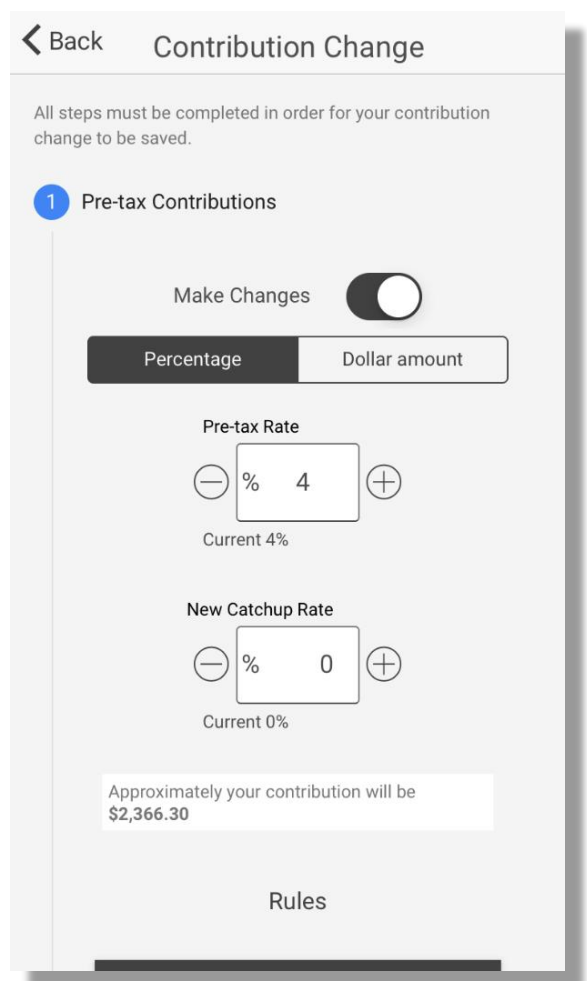
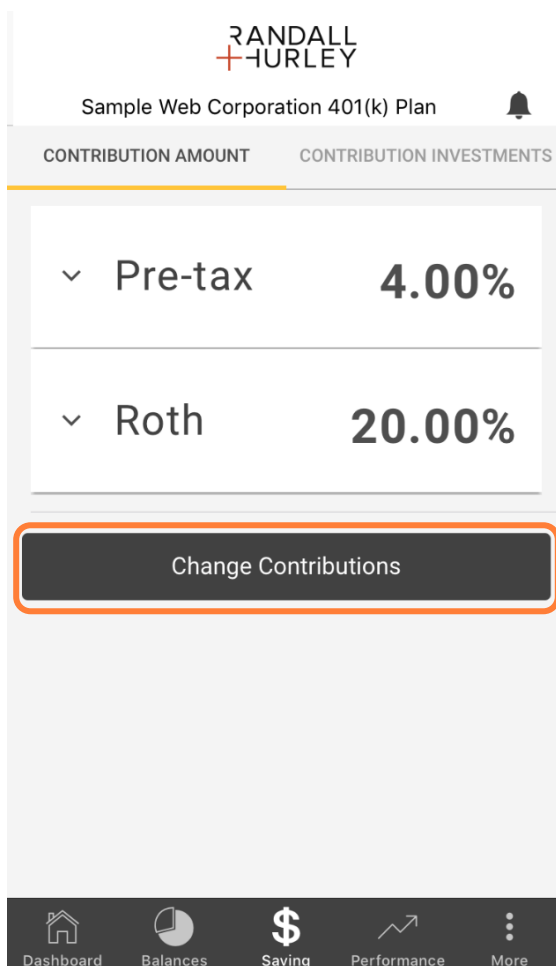
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## MOBILE APP - FEATURES

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### CONTRIBUTION CHANGE (PLAN SPECIFIC)

- If your plan allows a contribution change online, a Change Contributions button will be visible on the Contribution Amount tab as highlighted below. Clicking this button will open a guided process to allow you to change contribution rates.





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## MOBILE APP - FEATURES

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### CONTRIBUTION INVESTMENT

- This form displays how new contributions are invested (investment elections) for each available source of money. To switch sources, select the source drop-down control.

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Sample Web Corporation 401(k) Plan

CONTRIBUTION AMOUNT | **CONTRIBUTION INVESTMENTS**

Select Source

**Employer Profit Sharing Contributions (subject to vesting)**

Heartland Value Fund

**100.00%** HRTVX

Dashboard | Balances | **Saving** | Performance | More

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Sample Web Corporation 401(k) Plan

CONTRIBUTION AMOUNT | CONTRIBUTION INVESTMENTS

Select Source

**Employer Profit Sharing Contributions (subject to vesting)** ✓

Employee salary deferral

Employee Roth Contributions

Cancel | **OK**

Dashboard | Balances | **Saving** | Performance | More



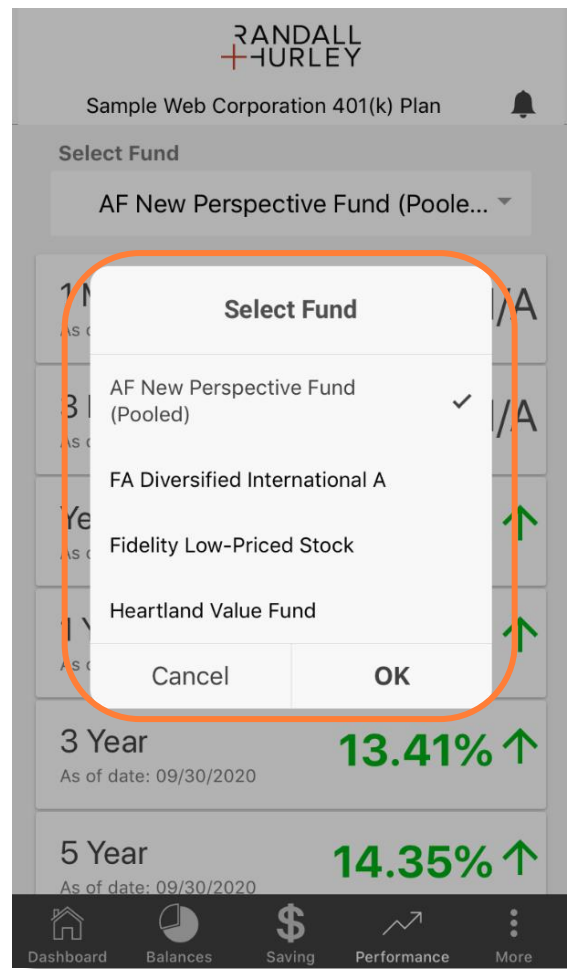
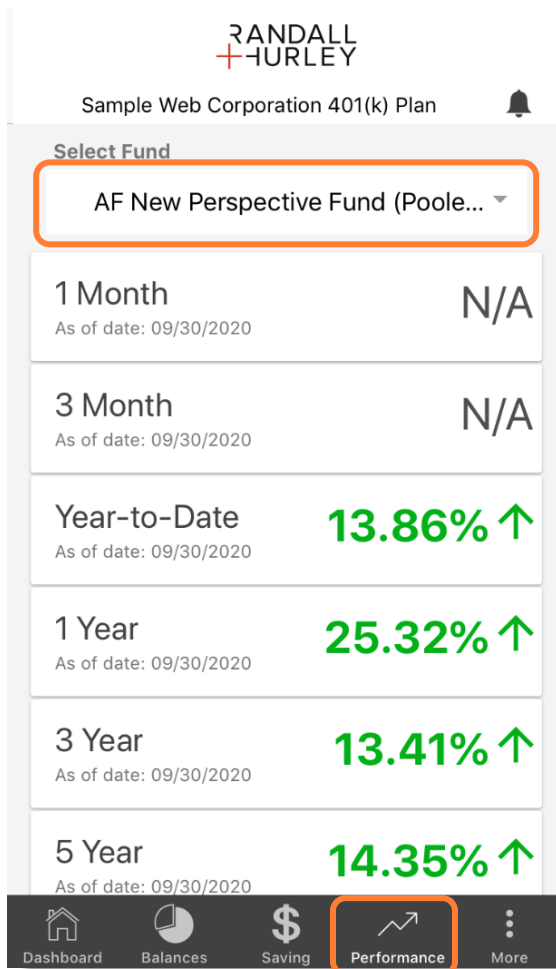
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## MOBILE APP - FEATURES

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### INVESTMENT PERFORMANCE

- You can view investment performance by selecting an investment in the drop-down box at the top of the form to see all the performance statistics available for the investment.





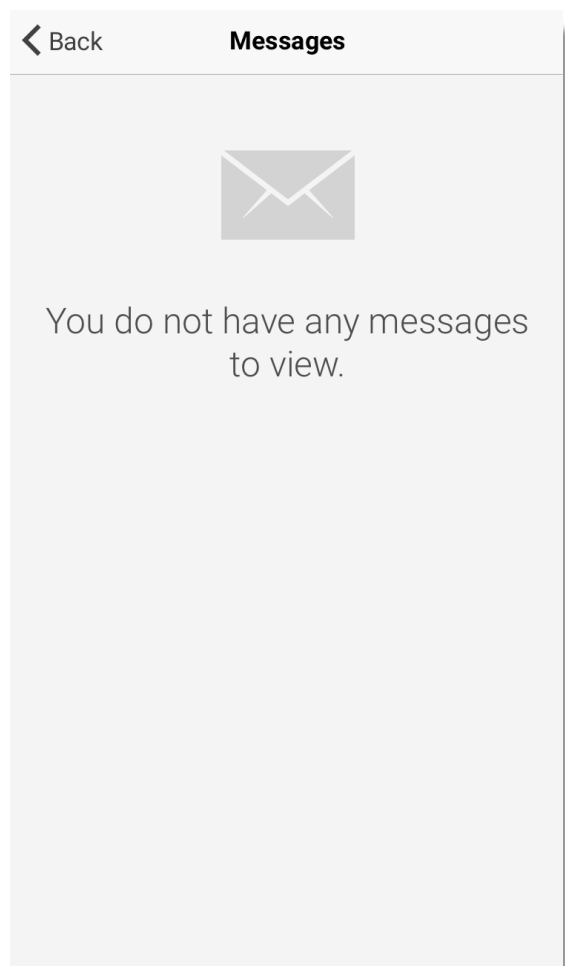
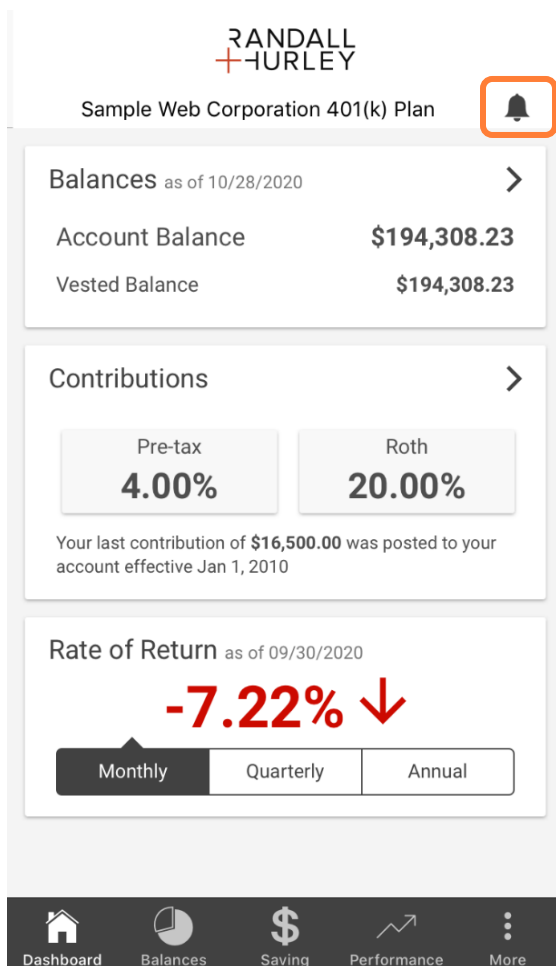
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## MOBILE APP - FEATURES

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### MESSAGING / PUSH NOTIFICATION

- Messages may be posted to the Mobile App as well as to the Web Portal. Messages posted to the App will be displayed on the Mobile App form. As with the Web Portal, messages posted as alerts will be displayed once the plan is selected. Messaging is accessed via a bell icon at the top of the page.





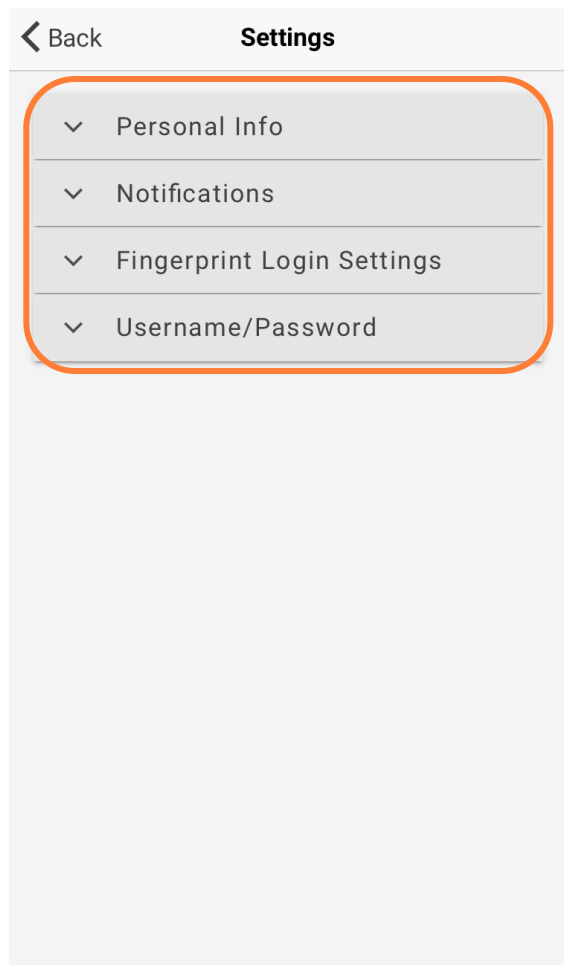
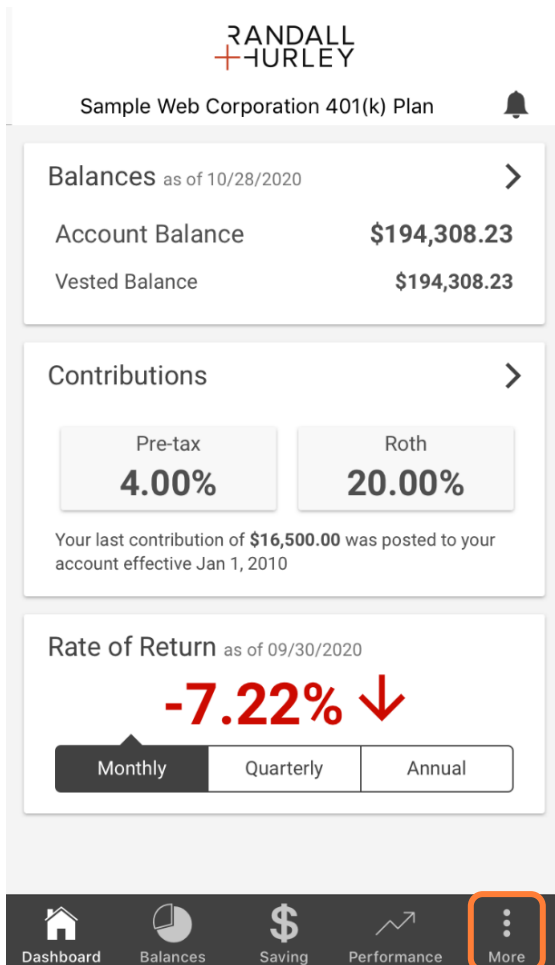
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## MOBILE APP - FEATURES

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### PROFILE & SETTINGS

- The settings information form contains four accordion panels: Personal Information, Notifications, Fingerprint login Settings, and Username/Password.





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## MOBILE APP - FEATURES

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### PERSONAL INFORMATION / NOTIFICATIONS

- Personal information displays the personal information elements as specified by your plan. If you are in more than one App-accessible plan, elements available for any of your plans will be displayed on this form.
- Notifications displays the settings for Push Notifications. If enabled, you are allowing a message notification to appear on your home screen without the need for being logged into the Randall + Hurley app.

**Settings**

Personal Info

Name: John Miller

Addresses

Home: 1328 N Whitman Lane  
Spokane  
WA 99218

Phone Numbers

Home: +1 (954)  
Office: +1  
Other:

Email Addresses

Preferred: m @randall-hurley.com  
Office:  
Other:

Notifications

Fingerprint Login Settings

**Settings**

Notifications

Enable Push Notification

Push Notification are messages that are sent directly to your mobile device, similar to a text message. This way you don't have to be logged into the app to be able to receive important information that would be beneficial to you.

Fingerprint Login Settings

Username/Password



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## MOBILE APP - FEATURES

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### FINGERPRINT (BIOMETRIC) / USERNAME - PASSWORD CHANGES

- Biometric login settings allow you to turn on or off biometric access features such as fingerprint.
- Password and username changes can be made in-app when this option is specified by your plan. When enabled, this feature is in the Personal Information menu under the expandable section labeled Username/Password. Slide to change your username or password, and you will be shown the criteria required, as well the fields to enter your new username or password

