

WEBSITE ENHANCEMENTS

New profile requirements on our retirement website



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We've added new security features on our benefits website to help safeguard your account. As a result, you will be asked to provide some new profile information next time you log in.

This guide will walk you through the setup steps that you may see. It also highlights other enhancements to our website.

If you have any questions or concerns, please contact us at (805) 369-6020 or info@evolveretirement.com.

What's in this document

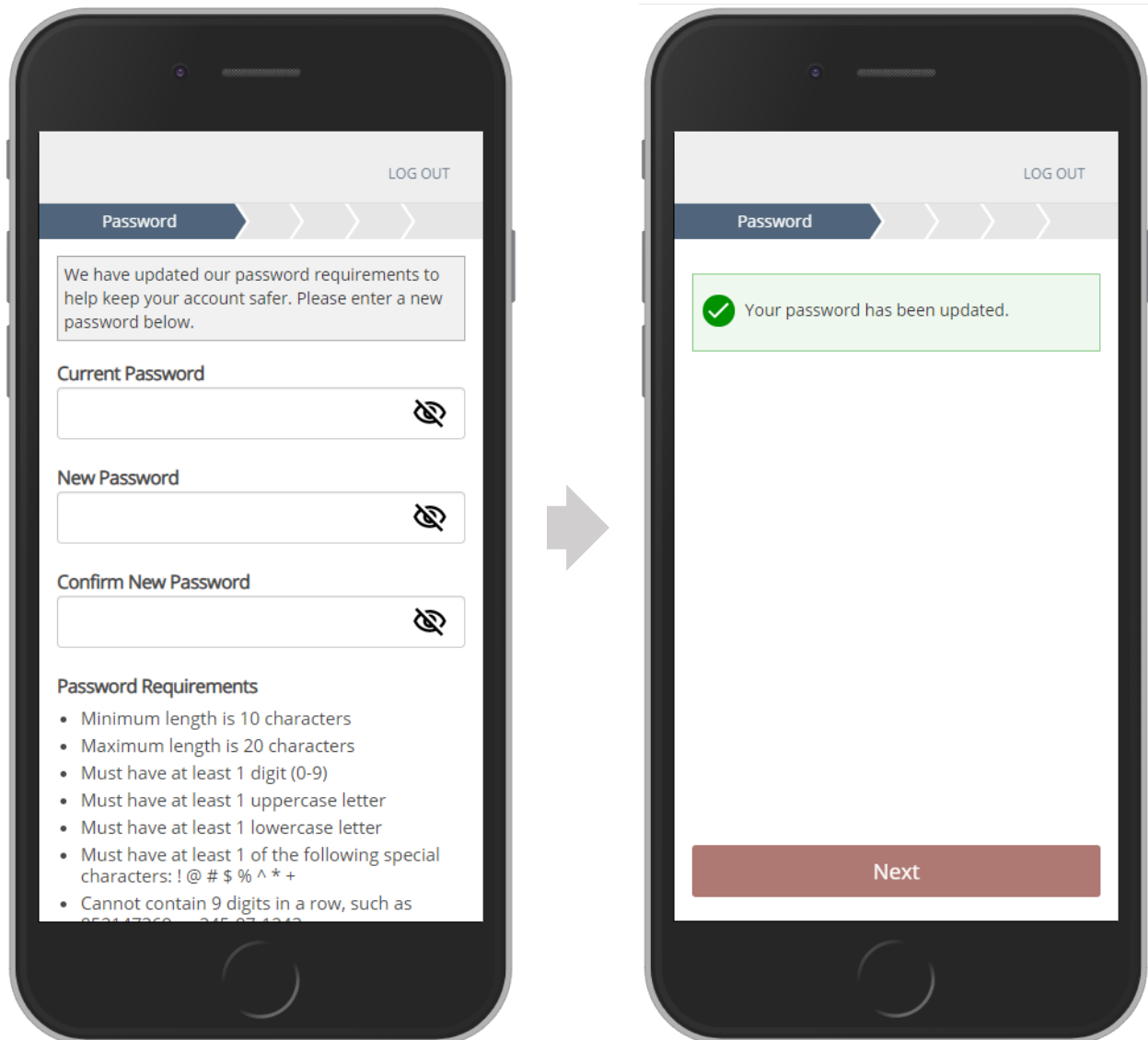
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New account setup steps

Password

We have implemented new requirements for passwords to help make your password harder to guess or crack. If your current password does not meet the requirements, you will be asked to enter a new one.

Note: We recommend using as many characters as possible for your password, up to the maximum length. Longer passwords are one of the most effective ways to protect against unauthorized account access.

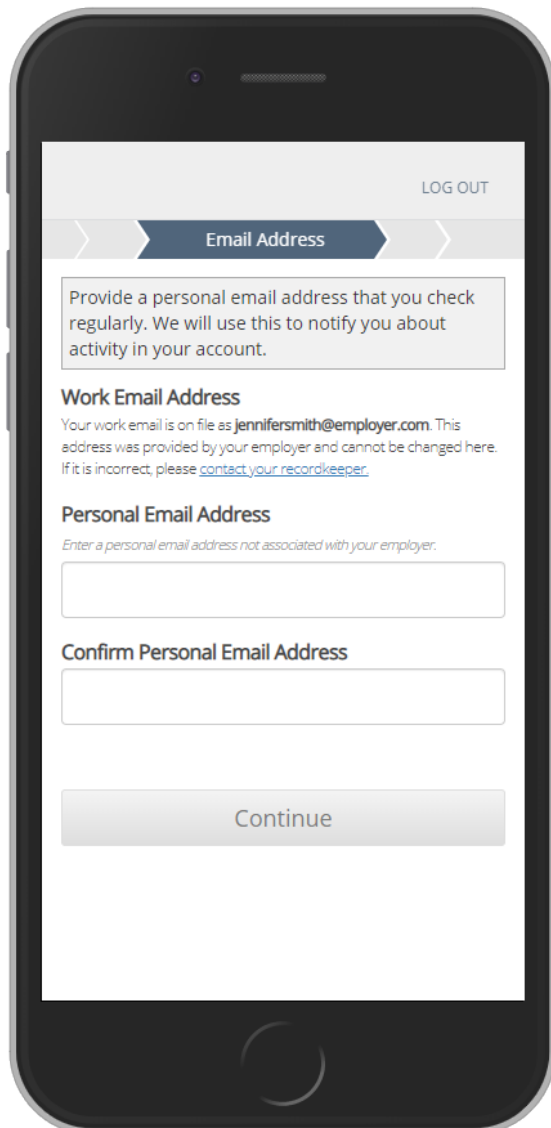


Email Address

You may already have an email address on file—most likely a work address that was provided by your employer. We now ask that you provide a second, personal email address.

Having two email addresses on file makes it harder for a malicious party to make changes in your account without your knowledge. It will also allow you to continue receiving notifications about your account if you leave your current employment.

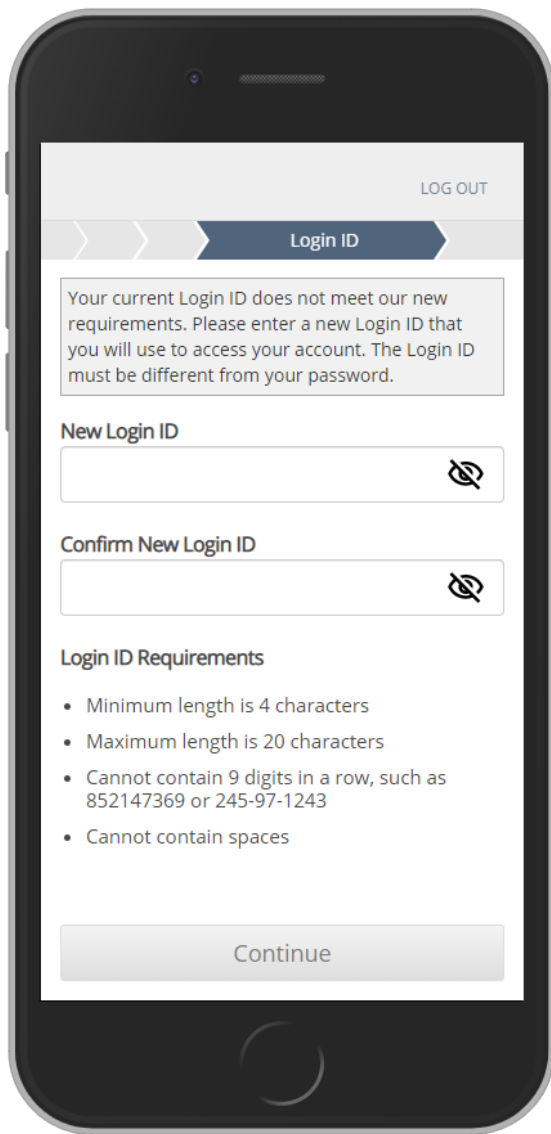
Note: An email address is displayed on this screen for verification, but it cannot be updated here. If you need to update it, please Evolve Retirement Plan Solutions at (805) 369-6020 or info@evolvetirement.com.



The screenshot shows a mobile application interface for updating an email address. At the top right, there is a 'LOG OUT' link. Below it is a navigation bar with 'Email Address' in the center, flanked by left and right arrow icons. A text box contains the instruction: 'Provide a personal email address that you check regularly. We will use this to notify you about activity in your account.' Below this, the 'Work Email Address' section shows 'jennifersmith@employer.com' with a note that it cannot be changed here and a link to 'contact your recordkeeper'. The 'Personal Email Address' section has a text input field with the placeholder 'Enter a personal email address not associated with your employer.' Below that is a 'Confirm Personal Email Address' section with another text input field. At the bottom is a large 'Continue' button.

Login ID

You may be asked to create a unique Login ID that you will use to sign into your account. You cannot use a Social Security number as your Login ID. If you already have a Login ID that meets the requirements, the system will skip this step.



The image shows a smartphone screen with a login interface. At the top right, there is a "LOG OUT" link. Below it, a progress indicator shows "Login ID" as the current step. A message box states: "Your current Login ID does not meet our new requirements. Please enter a new Login ID that you will use to access your account. The Login ID must be different from your password." Below this are two input fields: "New Login ID" and "Confirm New Login ID", each with a clear (X) icon. Underneath is a section titled "Login ID Requirements" with a bulleted list: "Minimum length is 4 characters", "Maximum length is 20 characters", "Cannot contain 9 digits in a row, such as 852147369 or 245-97-1243", and "Cannot contain spaces". At the bottom is a "Continue" button.

Security Questions

You will be asked to set up three new security questions. We will use these questions to verify your identity if you forget your Login ID or password.

For each question, select a question from the drop-down menu, then enter your answer in the boxes below.

LOG OUT

Security Questions

We now require three security questions to help verify your identity if you forget your Login ID or password. Please set up your questions and answers below.

Question 1

Question 1

Click to select

Question 1 Answer

Confirm Question 1 Answer

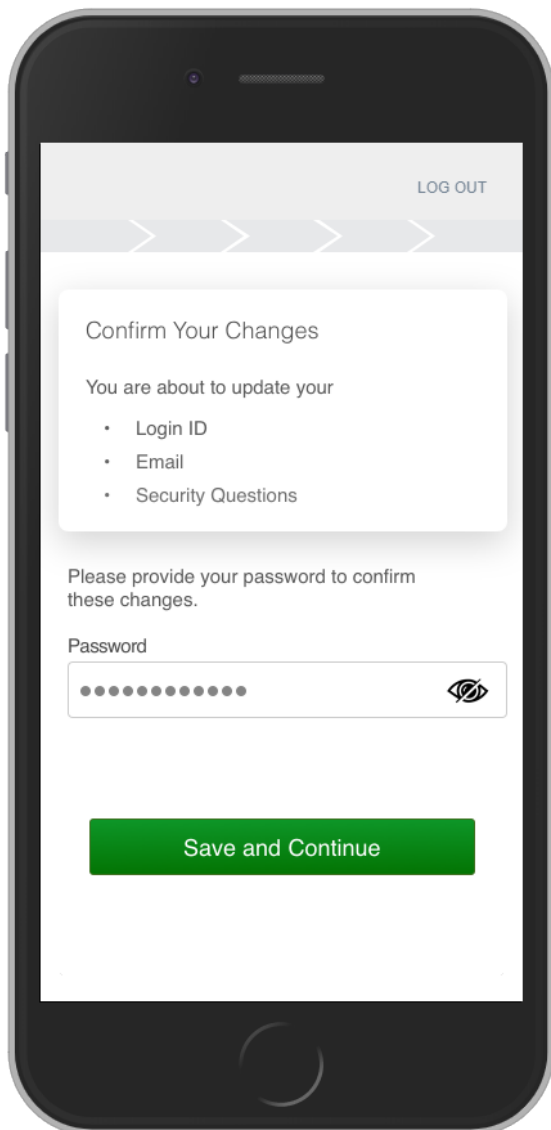
Security Answer Requirements

- Minimum length is 8 characters
- Maximum length is 200 characters

Confirm Your Changes

At the end of the account setup process, a confirmation page will ask you to confirm any changes you are making to your Login ID, email address, and security questions.

To submit these changes, enter your current password. (If you changed your password as part of the account setup process, use the new one.) Then click **Save and Continue**.



Hypothetical example. Subject to change.

Updated profile pages

The profile pages on our website have been redesigned to make it easier for you to update your contact information, security settings, and account preferences.

The screenshot shows the ABC Retirement website interface. At the top, the logo for ABC Retirement (An SIRT Divers Company) is on the left, and 'ABC Company 401(k) Plan' is in the center. On the right, there are links for 'PROFILE' and 'LOG OUT'. Below the header, a greeting says 'Good Afternoon, Jennifer'. A navigation bar includes 'HOME', 'MANAGE', 'VIEW', and 'LEARN'. A dark bar below the navigation says 'Your Account'. The main content area is titled 'Profile Information' with the instruction 'Use these tools to update your profile information.' Below this, the user's 'Name: Jennifer Smith' and 'Date of Birth: 08/05/1996' are displayed. A sidebar on the left lists various profile settings: Login ID, Password, Email Address, Security Questions, Phone Number, Image Authentication, Beneficiaries, Delivery Preferences, and Address. The 'Login ID' section is active, showing three input fields: 'Current Password', 'New Login ID', and 'Confirm New Login ID', each with a toggle icon. Below these fields are 'Login ID Requirements' listed as: Minimum length is 4 characters, Maximum length is 20 characters, Cannot contain 9 digits in a row, such as 852147369 or 245-97-1243, and Cannot contain spaces. A 'Save' button is at the bottom of the form.

Hypothetical example. Subject to change.

Accessing your profile

On mobile devices, you can access your profile by opening the menu in the upper left and selecting **Profile > My Profile**. On larger screens, click on the My Profile icon (👤) in the upper right.

Improved email notifications about account security

To keep your account safer, you will now receive an email notification whenever your security information is changed. This includes any change to your password, Login ID, security questions, email address, postal address, or phone number. These security notifications will be sent to all email addresses we have on file for you.

Coming soon: Two-step verification

We will soon be adding two-step verification as an additional safeguard for your account. Two-step verification is a second login step that uses a one-time passcode, sent via email or text, to confirm your identity.

Stay tuned for more information about two-step verification later this year.