

# Coming soon: Two-step verification

Our online portal will require two-step verification to protect your account starting on December 9, 2021. Keep reading to learn more about this upcoming security feature.

If you have any questions or concerns, please contact us at [info@evolvetirement.com](mailto:info@evolvetirement.com) or (805) 369-6020.



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## What is two-step verification?

Two-step verification is a second login step that helps to protect your account against unauthorized access. It requires you to enter a one-time security code that has been sent to your email or mobile phone when you log in.

Enter your security code

A security code has been sent to the email address or phone number that you set up for two-step verification. The code will expire in 5 minutes.

Enter Security Code

6-digit code

[Need help getting code?](#)

Trust this device ⓘ

Continue

See the following pages for more details on setting up and using two-step verification.

## Set up two-step verification

1. The first time you log in after two-step verification is released, you will be prompted to set up the new feature.

Two-Step Verification

To protect your account, we now require two-step verification. Please take a moment to set up this feature.

2. During setup, you can choose to receive security codes via email or text message. If you don't already have contact information on file, you'll be able to enter a new email address or phone number here. You can also choose whether to always use two-step verification, or to skip it on devices you trust.

Delivery method

Send my security code via:

Email

•

Text message

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Frequency

Verify my identity with a security code:

Only on untrusted devices

Every time I log in

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Please provide your password to confirm your new two-step verification settings

Password

Message and data rates may apply. [Terms and Policies](#)

3. After you set your preferences, we will send you a security code to confirm.

Enter your security code


A security code has been sent to the email address or phone number that you set up for two-step verification. The code will expire in 5 minutes

Enter Security Code

[Need help getting code?](#)

**Continue**

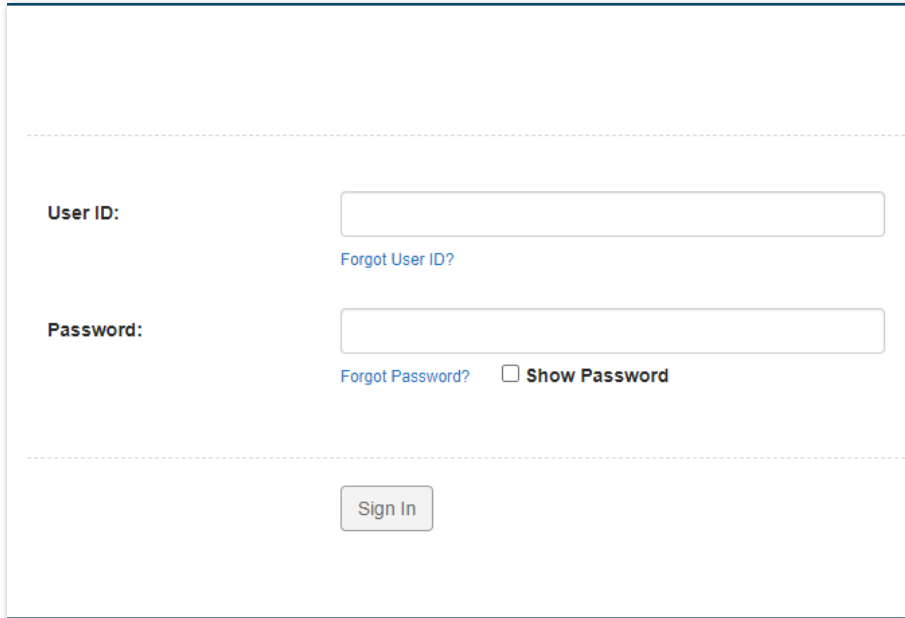
4. You will see a success message once two-step verification has been set up.

 Two-step verification is now set up on your account. We'll send a security code to (xxx) xxx-3210 when you log in using an untrusted device.

## Log in with two-step verification

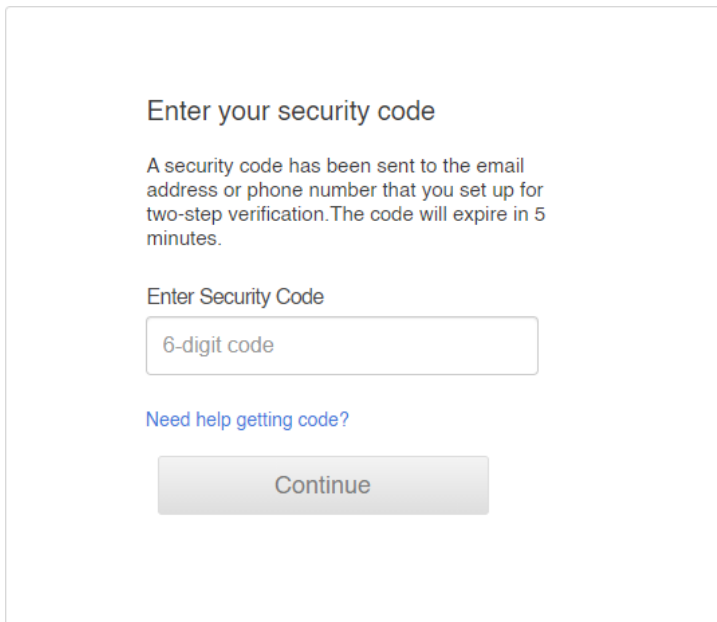
After two-step verification is set up, it will become part of the login process.

1. First, log in as usual with your user ID and password.



The screenshot shows a login form with two main input fields: "User ID:" and "Password:". Below the "User ID:" field is a link that says "Forgot User ID?". Below the "Password:" field are two options: "Forgot Password?" and a checkbox labeled "Show Password". At the bottom of the form is a "Sign In" button. The form is enclosed in a dashed-line border.

2. Next, you will be asked to enter a security code that has been sent to your email or phone. The code can be used only once and will expire after a few minutes.

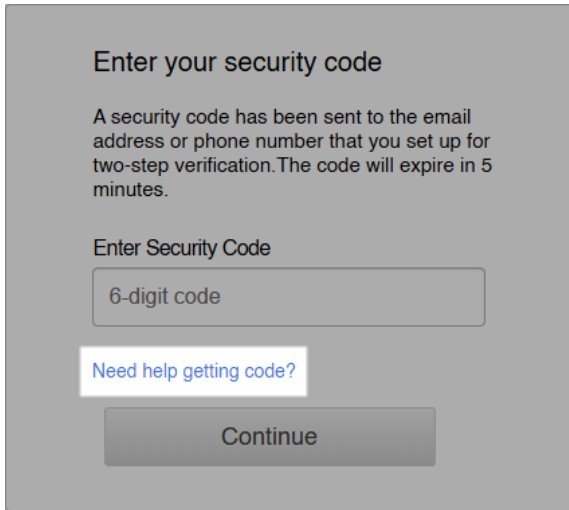


The screenshot shows a screen titled "Enter your security code". Below the title is a paragraph: "A security code has been sent to the email address or phone number that you set up for two-step verification. The code will expire in 5 minutes." Below this is a label "Enter Security Code" and a text input field containing "6-digit code". Below the input field is a link that says "Need help getting code?". At the bottom is a "Continue" button.

Note: Text messages from our system will show the short code 91821 as the sender.

## Resend a security code

1. If you don't receive a security code, select the **Need help getting code?** option.



Enter your security code

A security code has been sent to the email address or phone number that you set up for two-step verification. The code will expire in 5 minutes.

Enter Security Code

6-digit code

[Need help getting code?](#)

Continue

2. On the **Resend Security Code** screen, enter an email address or phone number on file with us and select **Continue**.

contact us.' At the bottom is a grey 'Continue' button. At the very bottom, there is a small note: 'Message and data rates may apply. [Terms and Policies](#)'." data-bbox="174 442 561 839"/>

Resend Security Code

Enter an email address or phone number that is on file with us.

Email

Text message

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Get Help

It can take several minutes for the security code to arrive. If you still haven't received the code, or if you can't access any of the delivery options listed above, please [contact us](#).

Continue

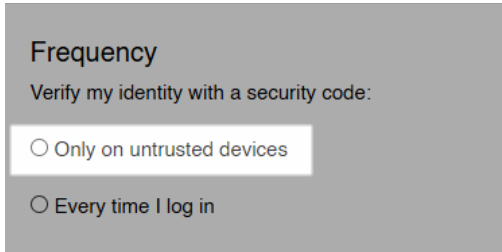
Message and data rates may apply. [Terms and Policies](#)

Note: To resend a code, you must enter an email address or phone number that is already on file with us.

## Trust a device

You can tell us to trust a device so you don't have to enter a security code when you log in using that device. To use this feature:

1. Choose the option **Only on untrusted devices** when you set up two-step verification.

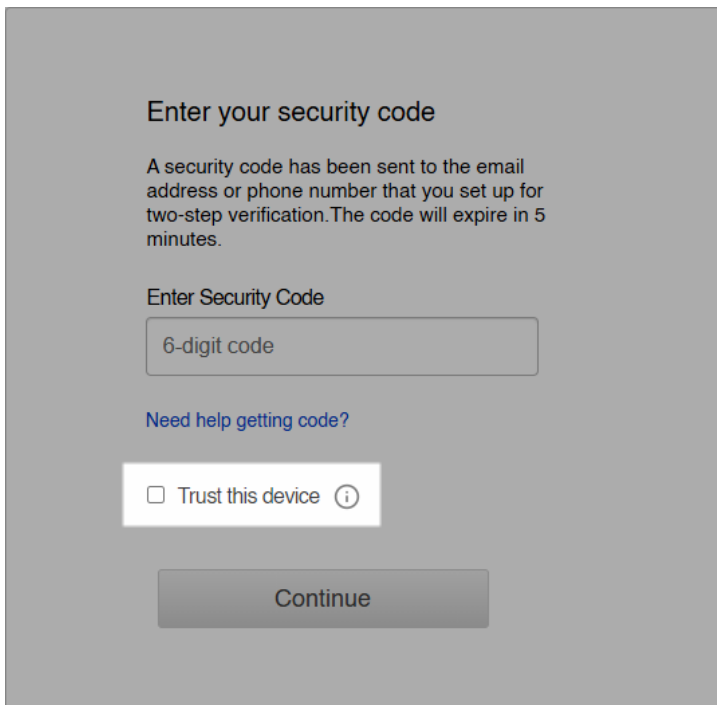


**Frequency**  
Verify my identity with a security code:

Only on untrusted devices

Every time I log in

2. Select **Trust this device** when you log in using a device you want to trust.



**Enter your security code**

A security code has been sent to the email address or phone number that you set up for two-step verification. The code will expire in 5 minutes.

Enter Security Code

6-digit code

[Need help getting code?](#)

Trust this device ⓘ

Continue

Note: A device's trusted status will expire if you don't log in using that device for 90 days.

## Change your two-step verification preferences

After two-step verification is set up, you can change your preferences at any time via the security options in the main menu.



The screenshot shows a dashboard for a plan sponsor. At the top right, it says "Welcome, John Sponsor" and "Prepared: 08/31/2021". Below this are navigation tabs: "MY PLAN(S)", "REPORT CENTER", "PARTICIPANTS", and "WITHDRAWALS". A "Home" button is also visible. A dropdown menu is open, showing "Set Up 2FA" and "Change Password". The main content area is titled "SUMMARY ACROSS ALL PLANS" and includes a table with the following data:

Plan ID	Plan	Plan Name	Participants with Balances	YTD Contributions	YTD Distributions
2				\$0	\$0
31				\$0	\$0

Summary statistics are shown above the table: 2 Total Plans, 31 Total Participants (with balances), \$0 YTD Contributions, \$0 YTD Distributions, and \$465,978 Total AUM. A "Top Plans" section on the right features a donut chart showing "Total \$465,978". At the bottom, there is a pagination control showing "1 - 2 of 2 items" and "25 Items per page".

2. Choose your preferred delivery method and frequency, enter your current password, and click **Continue**. We will send you a security code to confirm.

The form is titled "Two-Step Verification" and is contained within a white box. It has the following sections:

- Delivery method**: "Send my security code via:"
  - Email
    - j...r@company.com
    - j...r@email.com
  - Text message
    - (xxx)-(xxx)-3210
    - (xxx)-(xxx)-7890
- Frequency**: "Verify my identity with a security code:"
  - Only on untrusted devices
  - Every time I log in
- Password**: "Please provide your password to confirm your new two-step verification settings"  
A text input field for the password.
- Continue**: A button to submit the form.
- Message and data rates may apply. [Terms and Policies](#)