



www.sunwest-pensions.com

Simplifying Retirement Plans for Business

SUNWEST PENSIONS DAILY ADVANTAGE Internet Access

As a participant in your Employer's 401(k) Plan you have access to the Sunwest Pensions Daily Advantage Account Inquiry System. The internet site is available 24 hours a day by logging on to www.sunwest-pensions.com

You **MUST** have your Username and Password to access your account. When you access our website, select the "Click Here" button under the Log-In Participant Access at the top of the screen. You will be prompted to enter your Username which is your Social Security Number. Enter your Social Security Number (without dashes). The first time you log on, your Password will be your date of birth. Enter your date of birth as mmddyy (for example, if your date of birth is January 11, 1965 you will enter 011165).

We recommend that you change your Username and Password immediately. If you lose your Username or Password, please contact our office to have your login information reset.

The internet site allows you to perform the following functions:

- ✦ **Account Summaries** - Review your account balance in total, by fund or by source of money. You may also review your fund performance, loan activity, transaction history and obtain online statements.
- ✦ **Account Changes** - Allows you to make changes to your account:
 - ✦ **Transfer Funds** - Transfer **EXISTING** money between funds. This feature **does not** affect future deposits to your account.
 - ✦ **Rebalance Funds** - Reallocate the **ENTIRE** balance of your existing account among funds based on the percentages you selected.
 - ✦ **Change Fund Elections** - Change investment selections for **FUTURE** deposits only. This **does not** affect your existing account balance.
- ✦ **Planning Services** – Access to Loan Modeling, Retirement Projection, Morningstar Services and Performance Summaries.
- ✦ **Administrative Services** – Allows you to change your Username and Password, Update Participant Information and has your plan managers contact information.
- ✦ **Forms** – Obtain participant forms that you may need to withdraw funds from your account. Please refer to your Summary Plan Description for further information on the types of withdrawals available from your plan.

Changes must be posted to our internet site by 11 am Arizona time* to be processed that business day.

*NOTE: Arizona does not recognize Daylight Savings Time. Therefore, in the winter (October through April) Arizona is on Mountain Time and in the summer (April through October) Pacific Time.

SUNWEST PENSIONS
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