MyEkon Sponsor Portal Enhancements

Ekonnect Portal

- Home
- Plan Balance & Transaction Details
- Participant Information
- Plan Reports
- Plan Forms & Statements
- Send Messages & Files
- Change Password

Portal Navigation

The Portal navigation allows you to easily obtain plan & participant information, send secure messages and files, and review statements and forms.

Home Page

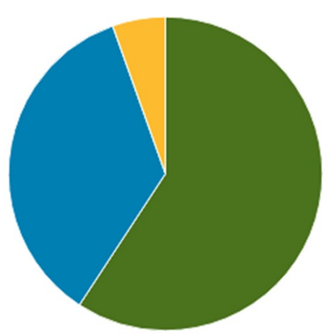
The Home screen provides a "Snapshot View" of your Plan as a whole, including an up-to-date Portfolio Balance as well as the balance categorized by source. Additionally, the Home screen features a Portfolio Performance graph which depicts portfolio changes over time in terms of cash flow and earnings.

Home

Sample Corporation 401(k) Plan

Portfolio Balance
as of 07/06/2016
$3,171,266.31

Source	Account Balance
Employee 401(k)	$1,878,490.92
Safe Harbor Matching	$1,119,797.86
Employer Discretiona	$172,977.53
Total	$3,171,266.31



Balance & Transaction Details

For a more detailed view, Balance & Transaction Details shows assets categorized by source and fund with risk-based color-coding identical to your quarterly statement. Drill down menus on many screens allow you to see further detail. In the table below, the drill down menus allow you to see which participants are invested in the fund. The table can also be copied to use in an Excel spreadsheet.
Transaction queries allow you to view transactions over a time period.

Participant A	$642.95
Participant B	$987.75

Balance & Transaction Details

Sample Corporation 401(k) Plan

	Employee 401(k)	Safe Harbor Matching	Employer Discretionary	Total
Standard Stable Asset Fund 3 (XSAF3)	$951.40	$562.52	$120.84	$1,634.76
PIMCO GNMA A (PAGNX)	$1,630.70	$972.74	$578.09	$3,181.53
PIMCO Real Return R (PRRRX)	$407.89	$242.23	$15.48	$665.60
Amer Funds Balanced R3 (RLBCX)	$2,707.96	$1,620.95	$99.91	$4,428.82
Amer Funds Washington R3 (RWMCX)	$1,005.22	$599.16	$512.14	$2,116.52
Invesco Comstock R (ACSRX)	$223.81	$128.76	$91.98	$444.55
AmCent Mid-Cap Value R (AMVRX)	$146.24	$79.74	$66.05	$292.03
Invesco S&P 500 Index A (SPIAX)	$2,574.91	$1,541.92	$79.74	$4,196.57
Invesco Select Companies R (ATIRX)	$2,040.97	$1,217.86	$7.92	$3,266.75
Amer Funds AMCAP R3 (RAFCX)	$431.74	$256.81	$20.14	$708.69
Amer Funds New Economy R3 (RNGCX)	$282.60	$162.45	$19.63	$464.68
Amer Funds SMALLCAP World R3 (RSLCX)	$858.34	$511.60	$40.72	$1,410.66
Amer Funds Cap World Gr&Inc R3 (RWICX)	$3,041.26	$1,821.35	$52.47	$4,915.08
Amer Funds Europacific Grth R3 (RERCX)	$384.94	$227.44	$13.09	$625.47

Participant Information

Participant Information allows you to view the balance and transaction details for a participant's account in the same style chart as above. Additionally, this section contains participant records & demographic information, MyEkon registration and access information, portfolio performance, account transactions, and up to two years of historical statements.

Frequently Asked Questions

How do I find the MyEkon Sponsor Access Portal?

The MyEkon Sponsor Access Portal can be found by going to www.MyEkon.com and clicking on "Sponsor MyEkon Access" in the navigation at left or accessed directly at www.ekonbenefits.com/securesend

Where can I find my login information for the Sponsor Portal?

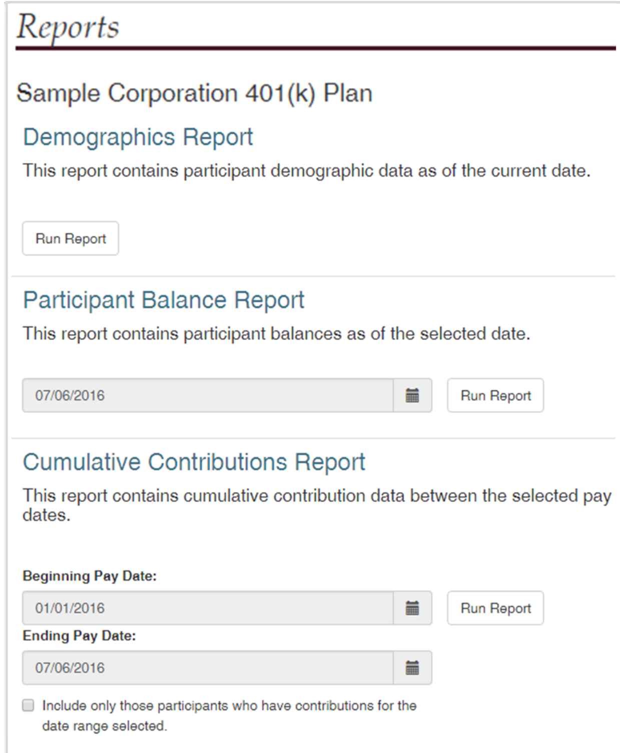
If you had Sponsor Portal access prior to the enhancements, use your same username and password to access the enhanced portal. If you would like Sponsor Access, please contact your Dedicated Plan Specialist.

I do not remember my password for Sponsor Access. How can I retrieve this information?

On the Log-in screen in the Sponsor Access Portal, enter your Username (email address) and click the "Forgot Password" button. You will receive an email with steps to reset your password.

I have additional questions about the enhanced MyEkon Sponsor Access Portal, who should I contact?

Please contact your Dedicated Plan Specialist by calling 314.367.6555.



Reports Feature

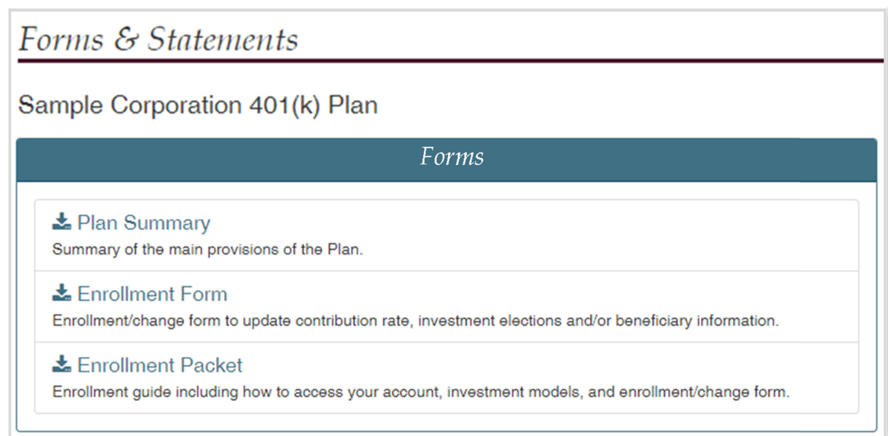
One of the most significant enhancements to the Sponsor Portal is the ability for Plan Sponsors to run Plan reports.

The Demographics Report contains pertinent Participant information which will assist with maintaining accurate Participant records. The Participant Balance Report contains the account balance of each Participant, categorized by source. The Cumulative Contributions Report displays total Participant contributions between two pay dates.

If loans are allowed in your Plan, a Loan Report will be accessible as well.

Forms & Statements

Another new feature in the Sponsor Portal gives Plan Sponsors the ability to view and print the Plan Summary, Enrollment Change Form & full Enrollment Packet for new Participants. This enhanced functionality allows Plan Sponsors to better assist their Plan Participants.



Secure Send - Messaging & File Transfer

Just as in the prior version of our Sponsor Portal, our proprietary Secure Send software allows you to securely send messages and transfer files directly to your Dedicated Plan Specialist.

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