

New Plan Sponsor Website "Plan Gateway"



Alerus Retirement Solutions is proud to announce the launch of our new plan sponsor website! "Plan Gateway" has many features that allow for easy navigation, efficient and secure data transfer, as well as more control over participant information. Log on to explore Plan Gateway at alerusretirementsolutions.com.  Effective July 1, 2011.

New Feature Highlights

Manage My Plan

Summary

- ✓ Monitor alerts for timely updates and notices
- ✓ At-a-glance summary of plan assets, last contribution, plan participation, web usage

Plan Features

- ✓ Highlights features in the plan and the next scheduled realignment dates

Balances

- ✓ View by investment, source, asset class
- ✓ Query and download activity, see Investment Changes

Investment Performance

- ✓ Historical fund performance, investment prices, current market and prospectus information

Manage Loans

- ✓ Query loans by status (current, new, past due, paid)
- ✓ View payment history and amortization schedules

Review Contributions

- ✓ Browse contributions by source, trade, or payroll date
- ✓ Download to CSV file

Check Disbursements

- ✓ Search disbursements by SSN, date, or type
- ✓ Expand to see payee name and address

Manage My Participants

Select participants

- ✓ Enhanced search capability
- ✓ **Action Item!** Edit participant information (address, date of birth, hire, term, or rehire)

Pending Activity

- ✓ View current and scheduled transactions

Manage My Site

Retrieve Files

- ✓ **Action Item!** Use the **Plan Forms/Documents** dropdown menu to download forms (enrollment, distribution, beneficiary, and more)
- ✓ **Action Item!** Use the **Payroll Reports** dropdown to retrieve weekly files, including new loans, rate changes, and new enrollees

Submit Files

- ✓ **Action Item!** No more faxing or emailing confidential information! Choose a Report Type using the dropdown menu. Enter description of the file, and attach your document.

Utilities

- ✓ View transactions and web activity

Request Reports

- ✓ Request participant reports in CSV (available next business day)

Any questions?

Send an email to admin@alerusmail.com or contact the Alerus Retirement Solutions call center at 800.433.1685.

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your best interestSM

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