

New Online Features



In an effort to provide the best user experience possible for retirement plan participants, we're unveiling three new features available through your online account at alerusretirementsolutions.com.

Quicken Integration - Through Quicken's *Web Connect* tool, you can download information to your computer, and then import it directly into your Quicken account.

Here's how:

Log into your account > select **My Balance** > click on the **Activity Summary** tab > select your search criteria. To import the activity history report you are viewing, click on the **text** under the Quicken logo along the right side of the screen.



Mutual Fund Data - Enhanced detail is now available for any publicly traded mutual fund held in your retirement plan.

Now you can:

- Expand the view by clicking on **+** to display the fund's benchmark and related benchmark performance
- Get the fund's ticker symbol
- Link directly to the fund's website
- Further expand the view by clicking **+** again to display fees charged by the fund
- Read a description of the fund's benchmark

Here's how:

Log into your account > select **Investment Performance** > click on the **Fund Performance** tab



Fund Prospectus History - If you have initiated a fund change on the web (changed your investment election for future deposits or transferred funds), you now have the ability to monitor and view prospectus information that was made available to you at the time you requested the transaction.

Here's how:

Select **Investment Performance** > click on the **Prospectus** tab

Any questions? Complete the *Contact Us* form on the website or call the Alerus Retirement Solutions call center at **800.433.1685**

