



Shepherd Plan Online Enrollment

LET'S GET STARTED!

To enroll in the Shepherd Plan online, please visit

<https://www.myplanprovider.com/rpc/>.

Step 1:

- ✓ Click on **Online Enrollment**

Step 2:

- ✓ Enter the password provided by your Plan Sponser. **Plan Password is calling body Plan ID #.**
- ✓ Click **NEXT**

Step 3:

- ✓ Type your **Social Security Number** (no spaces, no dashes) and your **Date of Birth** (mm/dd/yyyy)
- ✓ Click **NEXT**.

Already have a Username and Password?

- ✓ Type in your **Username** and **Password**, or follow the instructions provided in your welcome letter.
- ✓ From dropdown, select **Participant**
- ✓ Click **LOGIN**

If One-Time PIN (OPT) is required to login, refer to the Website Guide entitled "Logging in with Multi-Factor Authentication (MFA)" located on the [Website Guides](#) page.

If you do not remember your **Username** and/or **Password**, click the **I do not know my Username/ Password** link and follow the prompts.

Please contact Retirement Plan Consultants (RPC) with any enrollment questions at admin@retirementplanconsultants.net or 1-877-800-1114



Shepherd Plan Online Enrollment

Follow the **Enrollment Wizard** to enroll online. Please read all the instructions online before completing every step.

Step 1: Enter a username and password of your choice and choose your **Alternate Verification** questions and answers.

Overall Progress: **0% Complete**

Username Information

Items marked with an asterisk (*) must be completed before you can proceed to the next step.

Establish your Username: Must be 6-12 characters (numbers and/or letters): *

(alphanumeric digits, case-sensitive)

Establish your password *

(digits, case-sensitive)

Re-enter password *

Remember your Username and Password. You will need them to access your account via the plan website in the future.

Enrollment steps



Overall Progress: **0% Complete**

Items marked with an asterisk (*) must be completed before you can proceed to the next step.

Your Personal Information

First name *

Last name *

Marital status *

Male Female

Birth date *

Date of Hire *

Street address 1 *

Street address 2

City *

State *

Zip code *

Country

Home phone *

> Email

Fill in any of your personal information and email addresses that aren't complete and then click **NEXT**.

Please keep in mind that all items marked with an asterisk (*) must be completed.

RESET

NEXT



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Step 2:

Complete the Beneficiary Designation section providing as much information as possible.

Please keep in mind this is not a requirement but recommended.

Step 3: Click on the Action dropdown menu and choose either **"I want to contribute"** or **"I do not wish to contribute"** indicating whether you would like to withhold or not.

Make a selection for all types of contributions.

Click **NEXT**.

Participant Dashboard | Manage Your Account | Retirement Resources | Forms, Documents and Reports | Plan Selection

Designate Your Beneficiaries

Overall Progress: **33% Complete**

NOTE: Spousal Consent is required if the participant is married and the designated Primary Beneficiary is not the participant's spouse. The spouse's signature must be witnessed by either (1) a representative of the plan or (2) a Notary Public. A form to complete this is located [HERE](#).

This designation can have important tax and legal effects: you may wish to consult your advisor before continuing.

Beneficiary Designation 1

Items marked with asterisk (*) must be completed before you can proceed to the next step.

Beneficiary type: Primary (dropdown) | Beneficiary percentage: [input field]

Name: [input field] | Relationship: [dropdown] | Birth date: [calendar icon] | Social security number: [input field]

Street address 1: [input field] | Street address 2: [input field]

City: [input field] | State: [dropdown] | Zip code: [input field] | Country: [input field]

DELETE

Contributions

Overall Progress: **40% Complete**

Confirmation E-mail Address

A confirmation e-mail will be sent to **No e-mail address on record**.
If this address is incorrect, please [correct the address in the fields provided](#).

Current Contribution Amounts

Last Web/VRU Contribution	Total
Pre-Tax Deferral	\$0.00 per pay period
Roth Deferral	\$0.00 per pay period

Change Contribution Amounts
Please enter a contribution percentage or dollar amount that your employer will deduct from your compensation each payroll period. This will be deposited into your retirement plan account.

[Click here for more information on how much you may contribute to the plan!](#)

Action	Contribution Type	Percent/Dollar	Current Contribution	New Contribution Rate
Click to Select (dropdown)	Pre-Tax Deferral	Percent (dropdown)	Not contributing	0.00 per pay period
Click to Select (dropdown)	Roth Deferral	Percent (dropdown)	Not contributing	0.00 per pay period

RESET | BACK | **NEXT**



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Step 4: Choose a **Source of Money** from the list and insert the selected percentages for the investments of that source.

To select the same investment direction for all money, click on **All Sources**.

Click **Next**.

Select Investments Print

Overall Progress: **50% Complete**

Select a source of money from the list below to enter the election percentages for investments in that source. Please note that once you have completed the enrollment process, you can always change your investment election percentages.

We encourage you to contact your Financial Advisor with assistance in selecting your investment election.

Source of Money
If selecting different Investment Elections for your sources, remember to return to this step and complete for each source.

- All Sources**
- Employee Roth Deferral
- Employee Traditional Deferral
- Employer Match
- Employer Profit Sharing
- Unrelated Rollover

If you do not provide investment directions for your contributions, they will be defaulted to the Vanguard Target Ret 2055 Fund until you provide other investment instructions. Once contributions are defaulted, it is your responsibility to realign them in accordance to your investment elections. For more information, please contact your plan administrator.

Review Fund Performance and Prospectuses

I elect to invest all future contributions (including employee and employer contributions) as follows.

Confirmation E-mail Address

A confirmation e-mail will be sent to the address listed below.
If this address is incorrect, please correct the address in the fields provided.

Update e-mail address: Confirm e-mail address:

> Rules and Criteria

All Sources

Investment Current Elections New Elections

Tree down investment category under **ALL Sources** to select investment.

There is a questionnaire available to help with determining your risk tolerance. Once you have chosen elections equaling 100%, click **NEXT**.





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Enrollment steps Print

Overall Progress: **66% Complete**

Confirm & Submit

Information is correct, click below to submit your enrollment request

Personal Information Edit

Username:	224541001	Marital status:	Single
First name:			
Last name:	Demo		
Street address 1:	12365 S Heart St	Home phone:	(999) 999 - 9999
Street address 2:			
City:	Madison	Home email address:	
State:	NE	Office email address:	
Zip code:	68748	Send email confirmation to:	None
Country:			
Date of birth:	05/25/1988		
Date of hire:	04/01/2016		

I wish to receive my participant statement electronically at the email address specified above. No Yes

Salary Deferral Elections Edit

Pre-tax contributions	Deduct 5.00% each pay period.
Roth 401(k) contributions	Deduct 0.00 each pay period.

Investment Elections Edit

All future contributions to the plan will be invested as follows:

Target Date

Vanguard Target Ret 2025 Fund :	100.00%
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If your enrollment information is correct, click below to submit your enrollment request

SUBMIT

Step 5: Review your information.

Click **SUBMIT**.

The confirmation page will display.

To designate beneficiaries via a paper form, click the **HERE** link to access the form.

Click **CONTINUE** to access all Participant Web Features.

Enrollment steps Print

Overall Progress: **100% Complete**

✔ Congratulations! Your Enrollment is Complete.

You may access your account via the plan's website at any time using your Username and Password. If you elected to receive email confirmations, you will receive confirmation of your enrollment at the email address specified.

Reminders:

CONTINUE

Steps to Designate your Beneficiaries :

To designate your beneficiaries via a paper form, click **HERE** to access the form.

Please print the form and return a copy to your company's Human Resource department. Please also submit to Retirement Plan Consultants per the instructions on the bottom of the form.

This designation can have important tax and legal effects. You may wish to consult your advisor or lawyer when completing the beneficiary form.