

July Client Portal



○ **Power to Choose**

Instructions for Logging in and Downloading Fee Disclosure Report



Steps to Login to Client Portal

1. Go to <https://clientportal.julyservices.com>
2. Enter User Name and Password
3. Choose Plan (you may not need to do this if you only have one plan with July)
4. Select “Fees and Agreements” under “Plan Files”
5. Click on the Fee Disclosure Report to Open.

1 . Go to <https://clientportal.julyservices.com>

Welcome to Our Client Portal

Click to retrieve User ID and Password.



The screenshot shows a login form on a blue background. The form has two input fields: 'User Name' with 'User Id' entered, and 'Password' with 'Password' entered. A 'Login' button is located below the password field. To the right of the form is the JULY business services logo.

FOR ASSISTANCE Contact our Client Services Team Monday - Friday, 8:15am to 5:15pm Central Time.

Phone: 888.333.5859

Email: serviceteam@julyservices.com

2. Enter User Name and Password

- Enter your User Name and Password to Login.



A screenshot of a login form with a blue border. On the left, there are two input fields: "User Name" with "User Id" entered and "Password" with "Password" entered. Below these is a "Login" button. On the right, there is the JULY business services logo.

- Click “Retrieve User ID and Password” if you have forgotten.



3. Select Your Plan


Wednesday, May 02, 2012
John Humphrey
Test Co 401(k) Plan

[Home](#) [Plan Access](#) [Account Access](#) [My Service Team](#) [Logout](#)

➔ **Select Plan**

Plan Name	Company Name	Plan Type
TBA Test Plan - 001	The Benefit Advantage, Inc.	401(k) - Traditional
TBA Test Plan - 002	The Benefit Advantage, Inc.	401(k) - Traditional
Test Plan	Test Company	401(k) - Traditional

SELECT YOUR PLAN HERE

NOTE: You may not see this screen if you only have access to one plan.

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4. Select Fees and Agreements



 Wednesday, May 02, 2012
 John Humphrey
 July Business Services 401(k) Plan

Home | Plan Access | Account Access | My Service Team | File Library | Logout

Plan List > Plan Home

⊞ **Plan Highlights** ☰

✦ Plan Details

Plan Name: July Business Services 401(k) Plan
Plan Type: 401(k) - Safe Harbor
Client Since: 2/1/2002
Product: 401Kontrol - July
Plan EIN: 90-0265754

✦ Company Details

Company Name: July Business Services
Entity Type: S-Corporation
Company EIN: 74-2715820

⊞ **Census Data Requests**

✦ Active Periods

Click on a date below to view the details.

Period	Project Type	Outstanding Items	Due Date
12/31/2011	Standard	3	01/31/2012

☰ View Completed Periods

⊞ **Plan Files**

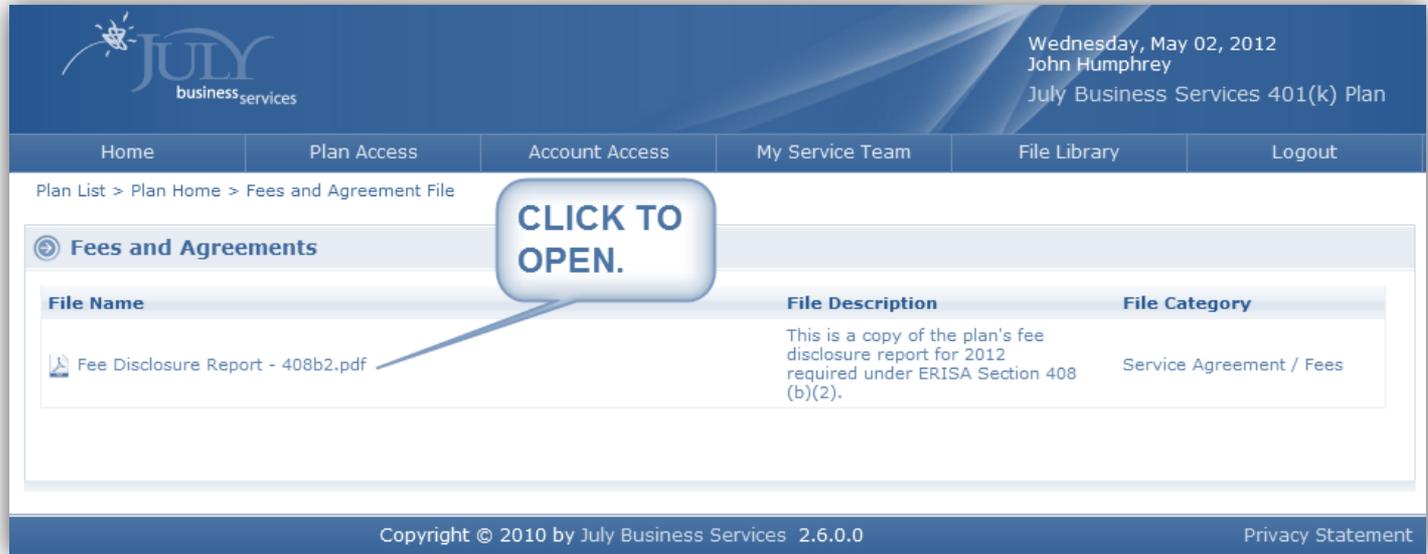
- ✦ Plan Setup Files
- ✦ Form 5500/Tax Returns
- ✦ Plan Notices
- ✦ Audit Files
- ✦ Other Plan Files
- ✦ Fees and Agreements

⊞ **Form 5500 / EFAST2**

- ✦ Instructions for obtaining EFAST2 Signer Credentials
- ✦ Provide 5500 Signer Info

Select Fees and Agreements

5. Click on the Fee Disclosure Report to Open



Wednesday, May 02, 2012
John Humphrey
July Business Services 401(k) Plan

Home Plan Access Account Access My Service Team File Library Logout

Plan List > Plan Home > Fees and Agreement File

CLICK TO OPEN.

Fees and Agreements

File Name	File Description	File Category
 Fee Disclosure Report - 408b2.pdf	This is a copy of the plan's fee disclosure report for 2012 required under ERISA Section 408 (b)(2).	Service Agreement / Fees

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