



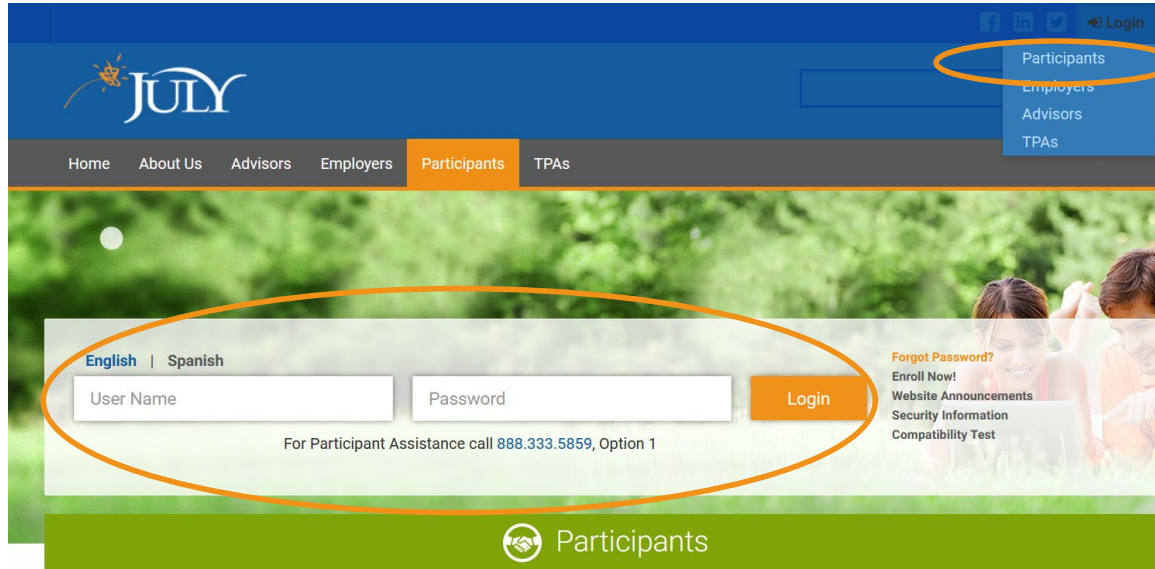
**Picture  
success.**

# JULY – Online Enrollment Process

[www.julyservices.com](http://www.julyservices.com)

888.333.5859

Login: [www.julyservices.com](http://www.julyservices.com)



Login can be found in upper right hand corner of website as well as by clicking the *Participants* tab.

For first time login:

1. Enter Plan Password: This will be provided by your employer.
2. Enter your Social Security number.

# Setting Up Your Security



Welcome, Paul Remick

## Security Setup

Each time you log in to this site from an unknown computer, you will be asked to answer one of these questions as an additional security step. Please answer two different questions for verification, and you will then be directed into the website.

### Alternate Verification Questions

Question 1 \*      Answer \*

What is your father's mi

Question 2 \*      Answer \*

What was your first pet'

**SUBMIT**

During first login, you will see the prompt for Security Setup.

# 5 Step Online Enrollment



- 1 • Personal Information
- 2 • Beneficiary Designation
- 3 • Contribution Elections
- 4 • Investment Elections
- 5 • Confirmation / Finalize

# Step 1 - Personal Information



## Enrollment steps

Print

---

Overall Progress: **0% Complete**

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

- > Your Personal Information
- > Email
- > Username Information
- > Security Question

RESET NEXT

# Step 1 - Personal Information



Enrollment steps Print

---

Overall Progress: **0% Complete**

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

✓ Your Personal Information

<b>First name</b> Paul	<b>Last name</b> Remick		
<b>Marital status</b> <input type="text"/>			
<b>Street address 1</b> 123	<b>Street address 2</b> Main Street		
<b>City</b> Waco	<b>State</b> TX	<b>Zip code</b> 76701	<b>Country</b> <input type="text"/>
<b>Home phone</b> 888 333 5859	<b>Office phone</b> 888 333 5859	<b>Ext</b> <input type="text"/>	
<b>Other phone</b> 888 333 5859			

# Step 1 - Personal Information / Email



## Enrollment steps Print

Overall Progress: **0% Complete**

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

> Your Personal Information

✓ Email

If you would like to receive confirmations of transactions, please fill out the following information:

Home remick@gmail.com	Confirm home email address remick@gmail.com
Office remick@julyservices.com	Confirm office email address remick@julyservices.com
Other 	Confirm other email address 

Where would you like your emails sent? \*

Home  Office  Other  None  I do not have an email address

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

\*Note: Be sure to continue through all steps of the enrollment process until you receive confirmation that your enrollment is complete. If you cancel or close your browser before completing the process, your enrollment will not be processed.

# Step 1 - Personal Information / Username

## Enrollment steps Print

---

Overall Progress: **0% Complete**

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

- > Your Personal Information
- > Email
- ✓ Username Information
  - Establish your Username**  
\*  
  
(alphanumeric digits, case-sensitive)
  - Establish your Password**  
\*  
  
(alphanumeric digits, case-sensitive)
  - Re-enter password: \***
- > Security Question

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



# Step 1 - Personal Information / Security



## Enrollment steps Print

Overall Progress: **0% Complete**

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

- > Your Personal Information
- > Email
- > Username Information
- ✓ Security Question

<b>Security question 1 *</b> What is your father's middle name? <input type="text" value=""/>	<b>Answer 1 *</b> <input type="text" value="Michael"/>
<b>Security question 2 *</b> What was your first pet's name? <input type="text" value=""/>	<b>Answer 2 *</b> <input type="text" value="Dude"/>

# Step 2 – Designate Beneficiaries



## Designate Your Beneficiaries Print

Overall Progress: **33% Complete**

Click on the name below to edit existing beneficiary information or click the "New Beneficiary" button to add a new beneficiary.

**IMPORTANT NOTICE:**  
Married participants that are electing a non-spousal primary beneficiary are required by law to designate their beneficiary via paper election and obtain a notarized spousal consent signature. Election of your beneficiary is a legal designation that you may wish to discuss with your legal advisor and update according to changes in your life circumstances such as marriage, divorce, birth of child or death of a beneficiary. The Plan Sponsor will use your beneficiary designation to determine the payment of death benefit distributions.

Click here to download the [Beneficiary Election Form](#) and return completed forms to [participantelections@julyservices.com](mailto:participantelections@julyservices.com) or fax to 800.617.7186.

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	Beneficiary percentage *
Primary <input type="checkbox"/>	<input type="text"/>

Name *	Relationship	Birth date	Social security number (optional)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Street address 1	Street address 2
<input type="text"/>	<input type="text"/>

City	State	Zip code	Country
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

---

# Step 3 – Contribution Elections



## Contributions

Print

Overall Progress: **40% Complete**

Confirmation E-mail Address

A confirmation e-mail will be sent to [remick@julyservices.com](mailto:remick@julyservices.com)  
If this address is incorrect, please [correct the address in the fields provided](#).

Current Contribution Amounts

Last Web Contribution	Total
Pre-Tax Deferral	\$0.00 per pay period
Roth	\$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 for deposit to your account.

> Rules and Criteria

Action	Contribution Type	Percent/Dollar	Current Contribution	New Contribution Rate
Change <input type="button" value="v"/>	Pre-Tax Deferral	Percent	Not contributing	<input type="text" value="7.00"/> per pay period
Change <input type="button" value="v"/>	Roth	Percent	Not contributing	<input type="text" value="7.00"/> per pay period

# Step 4 – Investment Elections



## Select Investments



Overall Progress: **50% Complete**

The investment elections you enter below will be applied to all sources of contributions (including any employer contributions). Please note that once you have completed the enrollment process, you can always change your investment elections. For more information, please contact your plan administrator once you have completed the enrollment process.

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. [remick@julyservices.com](mailto:remick@julyservices.com)

If this address is incorrect, please correct the address in the fields provided.

# Step 4 – Investment Elections



▼ All Sources

Investment	Asset Class	Current Elections	New Elections			
Franklin Income Fund R	Allocation-30% to 50% Equity		Devis New York Venture R	Large Blend	0.00%	<input type="text" value="0.00 %"/>
American Funds-Am Balanced R2	Allocation-50% to 70% Equity		Oppenheimer Main Street Opport Fund R	Large Blend	0.00%	<input type="text" value="0.00 %"/>
Janus Balanced Fund R	Allocation-50% to 70% Equity		SPDR S&P 500 ETF	Large Blend	0.00%	<input type="text" value="0.00 %"/>
American Funds Income Fnd R2	Allocation-70% to 85% Equity		American Funds Growth Fnd R2	Large Growth	0.00%	<input type="text" value="0.00 %"/>
Eaton Vance Floating Rate A	Bank Loan		Janus Forty Fund R	Large Growth	0.00%	<input type="text" value="0.00 %"/>
SPDR Gold Shares Trust	Commodities Precious Metals		AllianzGI NFJ Large-Cap Value Fund R	Large Value	0.00%	<input type="text" value="0.00 %"/>
American Funds New World R2	Diversified Emerging Mkts		American Funds-Amer Mutual R3	Large Value	0.00%	<input type="text" value="0.00 %"/>
American Funds EuroPacific R2	Foreign Large Growth		Victory Munder Mid-Cap Core Growth A	Mid-Cap Growth	0.00%	<input type="text" value="0.00 %"/>
Invesco International Growth R	Foreign Large Growth		Principal MidCap A	Mid-Cap Growth	0.00%	<input type="text" value="0.00 %"/>
Thornburg International Value Fund R3	Foreign Large Growth		Oppenheimer Mid Cap Value Fund C	Mid-Cap Value	0.00%	<input type="text" value="0.00 %"/>
Columbia Acom International A	Foreign Small/Mid Growth		Pioneer Mid Cap Value Fund R	Mid-Cap Value	0.00%	<input type="text" value="0.00 %"/>
Pioneer High Yield Fund R	High Yield Bond		Victory Sycamore Established Value R	Mid-Cap Value	0.00%	<input type="text" value="0.00 %"/>
iShares Barclays TIPS Bond Fund	Inflation-Protected Bond		American Funds US Government MMkt R2	Money Market	0.00%	<input type="text" value="0.00 %"/>
Columbia Total Return Bond A	Intermediate-Term Bond		Invesco Small Cap Growth Fund R	Small Growth	0.00%	<input type="text" value="0.00 %"/>
iShares Core Total US Bond Market ETF	Intermediate-Term Bond		Victory Integrity Small-Cap Value A	Small Value	0.00%	<input type="text" value="0.00 %"/>
PIMCO Total Return R	Intermediate-Term Bond		Victory Sycamore Small Co opp Fund	Small Value	0.00%	<input type="text" value="0.00 %"/>
Aggressive Allocation Model	Investment Product		SPDR Barclays 1-3 Month T-Bill ETF	Ultrashort Bond	0.00%	<input type="text" value="0.00 %"/>
Conservative Allocation Model	Investment Product		American Funds Cap In Blid R2	World Allocation	0.00%	<input type="text" value="0.00 %"/>
Conservative/Moderate Allocation Model	Investment Product		Oppenheimer International Bond Fund C	World Bond	0.00%	<input type="text" value="0.00 %"/>
Moderate Allocation Model	Investment Product		American Funds CapWld G&I R2	World Stock	0.00%	<input type="text" value="0.00 %"/>
Moderate/Aggressive Allocation Model	Investment Product		TOTAL		0.00%	<input type="text" value="0.00 %"/>
American Funds Fdmntl Inv R2	Large Blend					
American Funds InvI Co Am R2	Large Blend					

RESET TABLE

BACK NEXT

Total must equal 100%.

If you do not provide investment directions for your contributions, they will be defaulted to the American Funds-Am Balanced R2 until you provide other investment instructions. Once amounts are defaulted, it is your responsibility to realign them in accordance to your investment elections. For more information, please contact your plan administrator.

# Step 5 – Confirmation



## Enrollment steps

Overall Progress: **66% Complete**

### Confirm & Submit

If your enrollment information is correct, click below to submit your enrollment request.

---

#### Personal Information

<b>Username:</b> MrRemick	<b>Marital status:</b>
<b>First name:</b> Paul	
<b>Last name:</b> Remick	
<b>Street address 1:</b> 123	<b>Home phone:</b> (888) 333 - 5859
<b>Street address 2:</b> Main Street	<b>Office phone:</b> (888) 333 - 5859 Ext
<b>City:</b> Waco	<b>Other phone:</b> (888) 333 - 5859
<b>State:</b> TX	<b>Home email address:</b> remick@gmail.com
<b>Zip code:</b> 76701	<b>Office email address:</b> remick@julyservices.com
<b>Country:</b>	<b>Other email address:</b>
	<b>Send email confirmation to:</b> Office

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

---

#### Security Question

<b>Security Question 1</b>	<b>Answer 1</b>
What is your father's middle name?	Michael
<b>Security Question 2</b>	<b>Answer 2</b>
What was your first pet's name?	Dude

---

#### Salary Deferral Elections

<b>Pre-tax contributions</b>	Deduct 7.00% each pay period.
<b>Roth 401(k) contributions</b>	Deduct 7.00% each pay period.

---

#### Investment Elections

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

# Step 5 – Confirmation



### Investment Elections Edit

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

**Foreign Large Growth**  
Invesco International Growth R: 5.00%  
Thornburg International Value Fund R3: 10.00%

**High Yield Bond**  
Pioneer High Yield Fund R: 5.00%

**Intermediate-Term Bond**  
PIMCO Total Return R: 5.00%

**Large Blend**  
Davis New York Venture R: 5.00%

**Large Growth**  
Janus Forty Fund R: 20.00%

**Large Value**  
AllianzGI NFJ Large-Cap Value Fund R: 20.00%

**Money Market**  
American Funds US Government MMkt R2: 10.00%

**Small Growth**  
Invesco Small Cap Growth Fund R: 10.00%

**Small Value**  
Victory Integrity Small-Cap Value A: 10.00%

If your enrollment information is correct, click below to submit your enrollment request.

**SUBMIT**

# Step 5 – Finalize



## Enrollment steps



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:

The investment elections you entered during the enrollment process will apply to all sources of contributions. For more information, please contact your plan administrator.

[GO TO PLAN](#)



# Participant Website



Participant Website –  
Manage your account  
information and  
investments.

myFuture Retirement –  
Customizable retirement  
readiness tool.

Welcome, Paul Remick

Dashboard Manage Portfolio Loans & Withdrawals Forms & Reports Profile Plan Selection

### My Dashboard

#### Track Retirement

\$0.00 Projected income/mo.

IMPROVE

Goal: \$6,250 mo

Currently Projected 0% of the way there!

MYFUTURE RETIREMENT ANALYSIS

#### Account Balance

\$0.00

\$0 Vested Balance

% prior month's return

MANAGE INVESTMENTS

#### Contribution Rate

\$0 Pre-Tax

\$0 Roth

CHANGE CONTRIBUTION RATE

### My Portfolio

View: Overview Performance Model: 1-year

Investment Name	Fund ID	Expense	Performance	Asset Class	From My Paycheck	Balance
American Funds US Government Mkt R...	RABXX	0.69%	0%	Money Market	10%	\$0.00
Invesco International Growth R	AIERX	1.57%	4.82%	Foreign Large Growth	5%	\$0.00
Invesco Small Cap Growth Fund R	GTSRX	1.45%	21.05%	Small Growth	10%	\$0.00
Thorburn International Value Fund ...	TGVRX	1.58%	8.45%	Foreign Large Growth	10%	\$0.00
AlliantGI NFJ Large-Cap Value Fund ...	ANLTX	1.36%	18.29%	Large Value	20%	\$0.00
Victory Integrity Small-Cap Value A	VSCVX	1.57%	24.25%	Small Value	10%	\$0.00
Devia New York Venture R	NYVRX	1.18%	22.79%	Large Blend	5%	\$0.00
...	...	...	...	...	...	...

---

# Contact Us:

---



- Online: [www.julyservices.com](http://www.julyservices.com)
- Participant Services: 888.333.5859, option 1



**Picture  
success.**

# JULY – Online Enrollment Process

[www.julyservices.com](http://www.julyservices.com)

888.333.5859