

This form authorizes designated users to access plan and/or participant level data online. Use this form to add users or change current permissions for web access.

Please review the Access Type carefully before making a selection per user. Some Access Types allow contact information to be changed and transactions to be executed on behalf of the participant. JULY is not responsible for transactions, changes, requests, distributions, and/or approvals processed by individuals that are designated to have the applicable access.

Web Access Type Description	
Access Type	Description
View Only	View all data.
Full Access - No Distributions	View all data, upload payroll, update census, and request transactions.
Full Access + Distributions*	View all data, upload payroll, update census, request transactions, and approve distributions.
Payroll Upload	Upload contribution files.
Payroll Upload + Distributions*	Upload contribution files and approve distributions.

\* Plan Sponsors and TPAs only.

User Information and Access Type		
Name	Email	Phone
<b>User Type:</b> <input type="radio"/> Advisor <input type="radio"/> Plan Sponsor <input type="radio"/> TPA <input type="radio"/> Other		
<b>Action:</b> <input type="radio"/> View Only <input type="radio"/> Full Access No Distributions <input type="radio"/> Full Access + Distributions <input type="radio"/> Payroll Upload <input type="radio"/> Payroll Upload + Distributions		
Name	Email	Phone
<b>User Type:</b> <input type="radio"/> Advisor <input type="radio"/> Plan Sponsor <input type="radio"/> TPA <input type="radio"/> Other		
<b>Action:</b> <input type="radio"/> View Only <input type="radio"/> Full Access No Distributions <input type="radio"/> Full Access + Distributions <input type="radio"/> Payroll Upload <input type="radio"/> Payroll Upload + Distributions		
<p><b>Please complete additional forms to add or change additional user access.</b></p>		

Authorization	
<p>By signing this form the authorized representative of the company is authorizing July Business Services (JULY) to give the user(s) designated in this form access to the Plan Sponsor website, Participant website, Advisor website and the Client Portal website for "the Plan". "The Plan" agrees that the designated individual(s) is so authorized until the authorized company representative provides JULY with an updated Web Access Form. JULY may, without injury, act only on the instructions of any person(s) representing themselves to be the authorized individuals as named herein, and JULY shall not be liable for any claims, expenses (including legal fees) or losses resulting from having acted upon any instruction reasonably believed to be properly authorized and genuine.</p>	
_____ <b>Name of Authorized Company Representative (Print)</b>	_____ <b>Authorized Representative Signature</b>
_____ <b>Title of Authorized Representative</b>	_____ <b>Date</b>