Wipfli

Mobile App
Participant Guide

Download the Mobile App

Click on the link or the QR code below to install the app.

App Store / Apple iOS

https://apps.apple.com/us/app/id6449597886

Google Play / Android

https://play.google.com/store/apps/details?id=com.wipfli401k.mobile.retirement

App Store Information

- **App Name**: Wipfli Retirement
- **Display Name**: Wipfli Retire
- **Summary**: The Wipfli Retirement app gives you on-demand access to your retirement account.
- **Description**: The Wipfli Retirement app provides you with on-demand access from your mobile device to your retirement account with Wipfli. With this app, you can view your account balance, review fund performance, view/update your contribution rate, and modify your account password.

Highlighted Features

iOS and Android versions

View Balances, Rate of Return, Investments

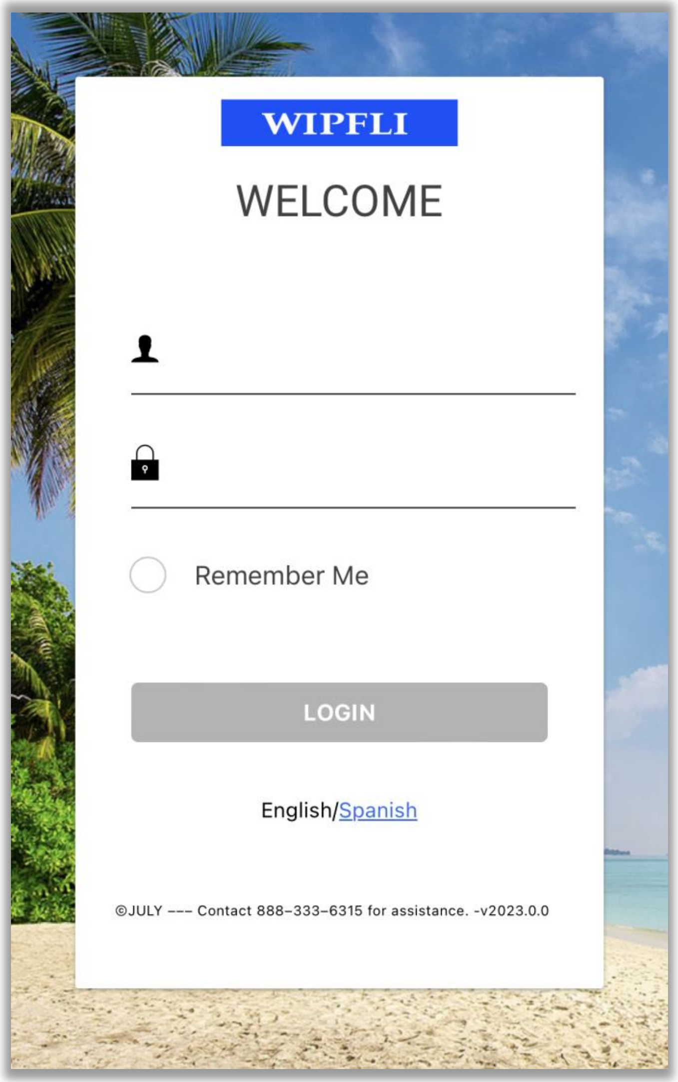
Biometric Login
- Face ID
- Fingerprint

Update Deferral Rates

Push Notifications

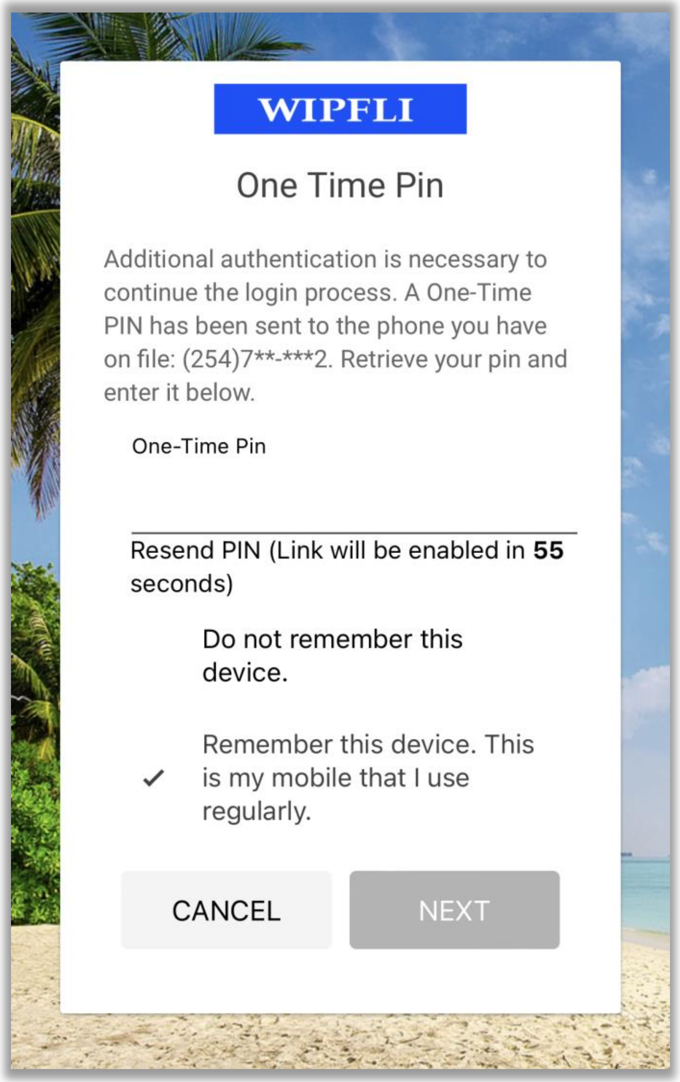
Modify Login Credentials

Logging Into Account



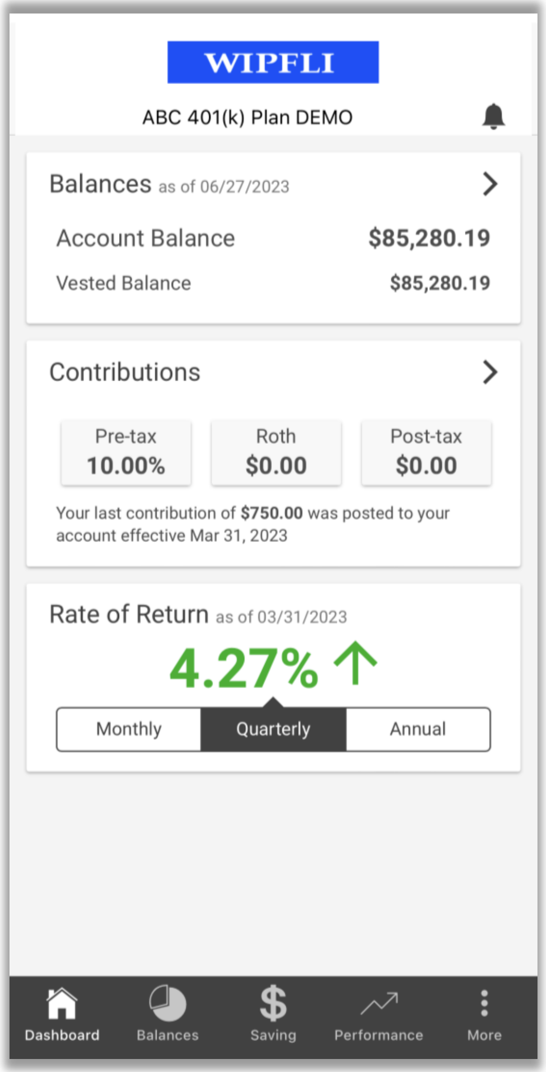
- Log into your retirement account using your participant website credentials and select whether you want to have the app remember your username for next time.
- Forgot username or password – CLICK HERE!
- After logging in for the first time, you will be prompted to complete the multi-factor authentication and receive a one-time PIN.
- For assistance logging in, contact our Participant Services Team at 888.333.6315 or using LiveChat on the participant website.

Logging Into Account



- Select whether you want to remember this device in the future or be asked for the one-time pin each time.
- After 1 minute, you can request the one-time pin again by clicking on Resend PIN.
- Forgot username or password – CLICK HERE!
- For assistance logging in, contact our Participant Services Team at 888.333.6315 or using LiveChat on the participant website.

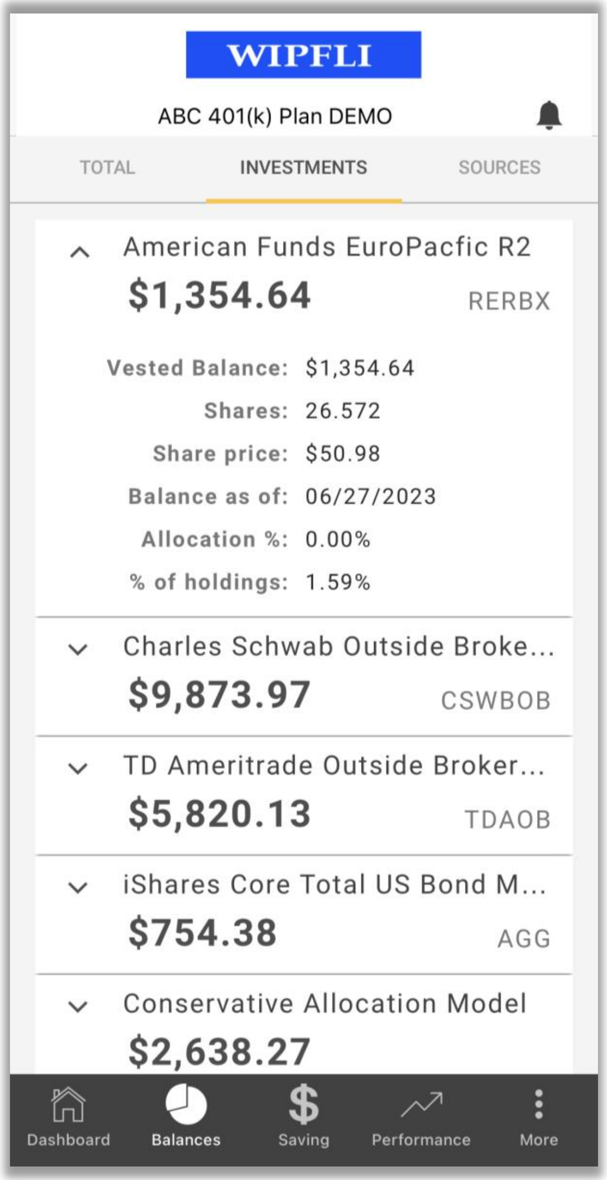
Account Dashboard



- The mobile app will open to the Dashboard once you are logged in.
- This page provides a summary of your balances, contributions, and personal rate of return.
- Click on any section for additional details.
- View your personal rate of return for different timeframes by switching between monthly, quarterly, and annual.
- Select the bell icon on the top right to view notifications for your account.

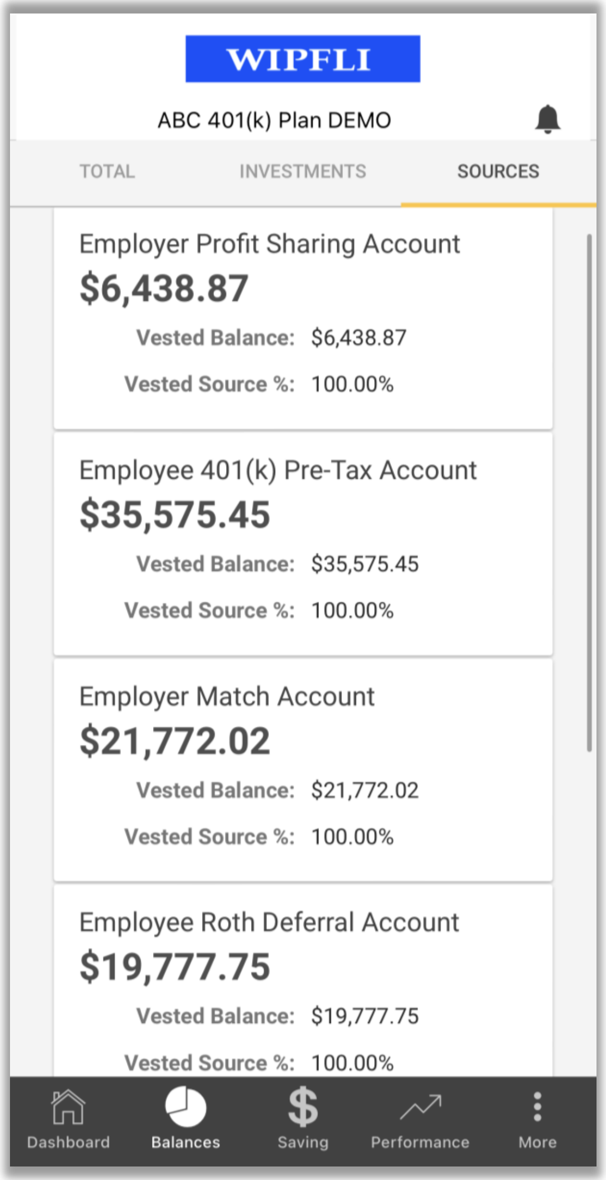
Balances View

- Select the Balances section to review your balances in more detail.
- The Investments section provides expandable details on your total and vested balance in each investment.
- Investments also includes details on the shares, share price, and date of valuation.
- The current investment allocation % is shown as well as the investment's current weight within your portfolio based on balance.

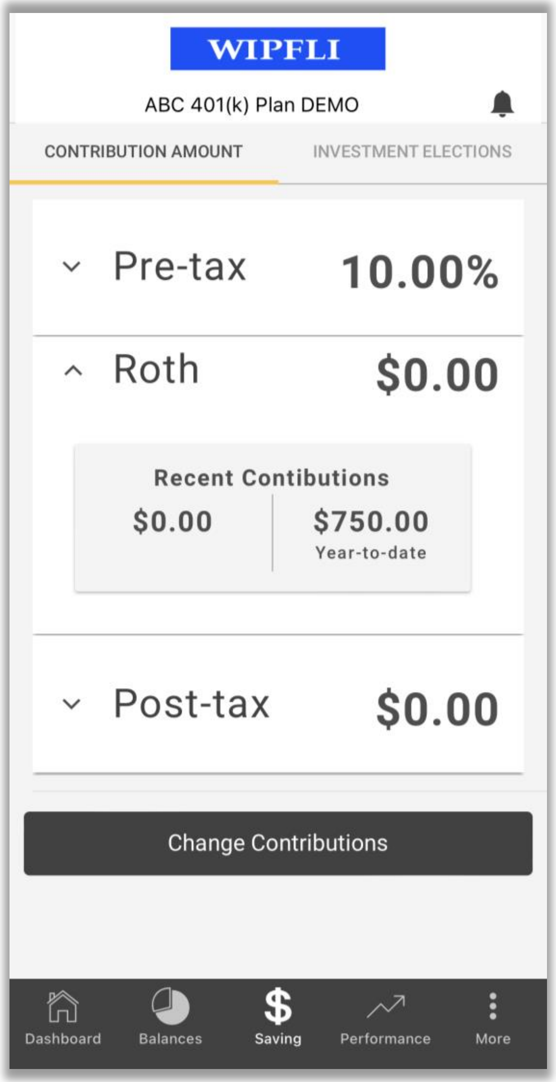


Balances View

- The Sources tab provides the balances by source for the account.
- The current total and vested balance for each source is listed.
- This section also provides the current vesting percentage in the source.



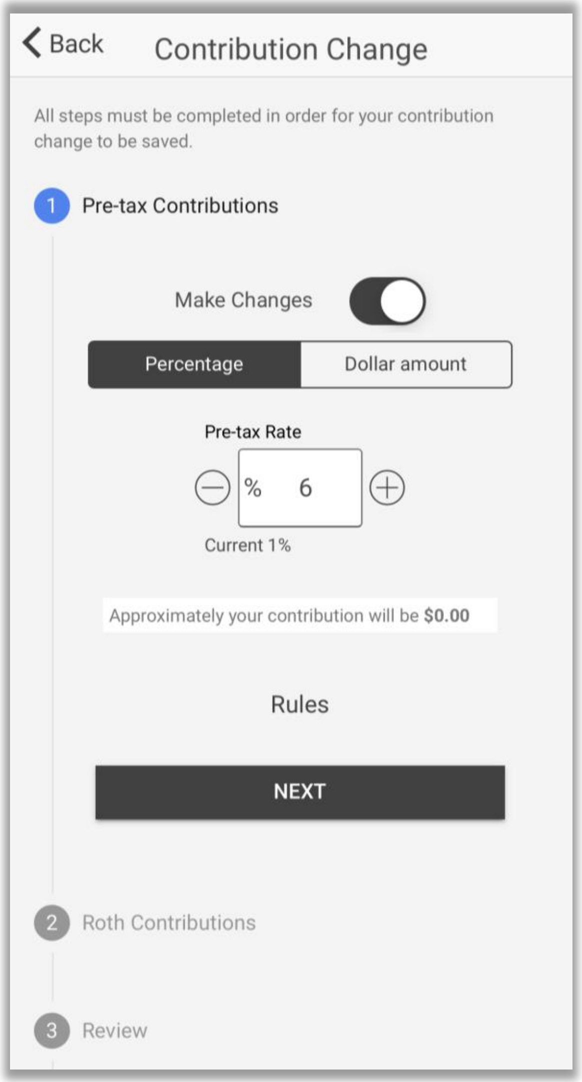
Saving View



- The Saving view provides the contribution rates in effect for each source.
- Recent contributions and the year-to-date amounts for each source are listed when you expand the source.
- Select the *Change Contributions* option to update deferral rates. The next slide walks through this process.

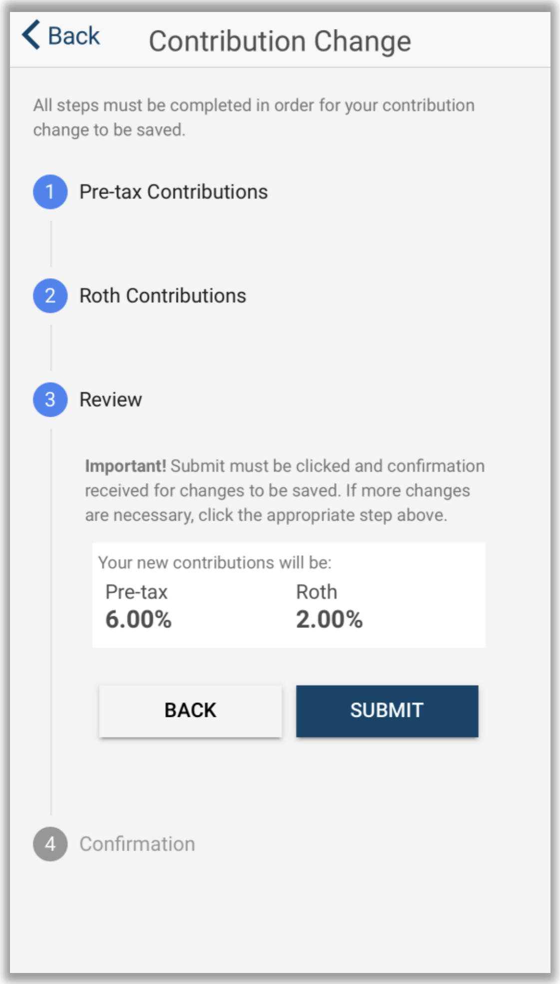
Change Contribution Rate

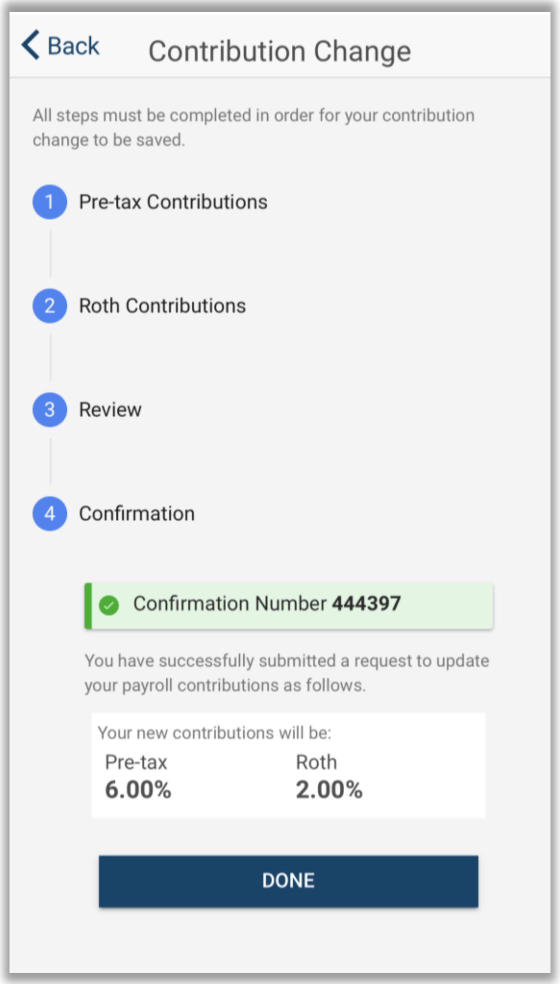
- Click the *Make Changes* option to enable the ability to update.
- Toggle between *Percentage* and *Dollar amount* for the type of election.
- Enter the amount in the field below or use the plus/minus to adjust.
- Click on *Rules* to see your deferral limits.
- Click on *Next* when ready to proceed.



Change Contribution Rate

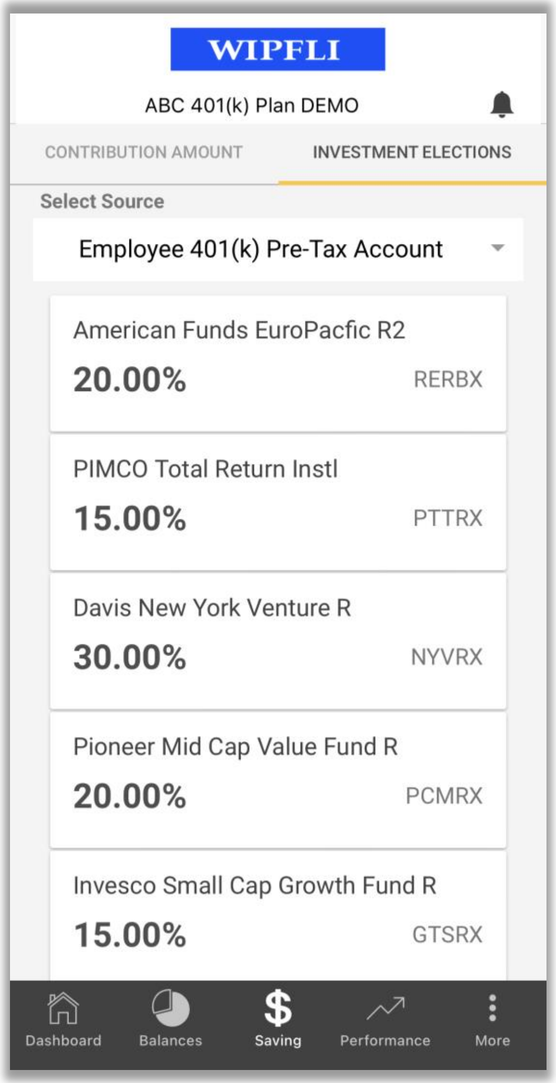
- Review your contribution changes for accuracy.
- Click *Submit* when you are ready for the change(s) to be processed.
- The final step provides confirmation the request was submitted and the confirmation number.

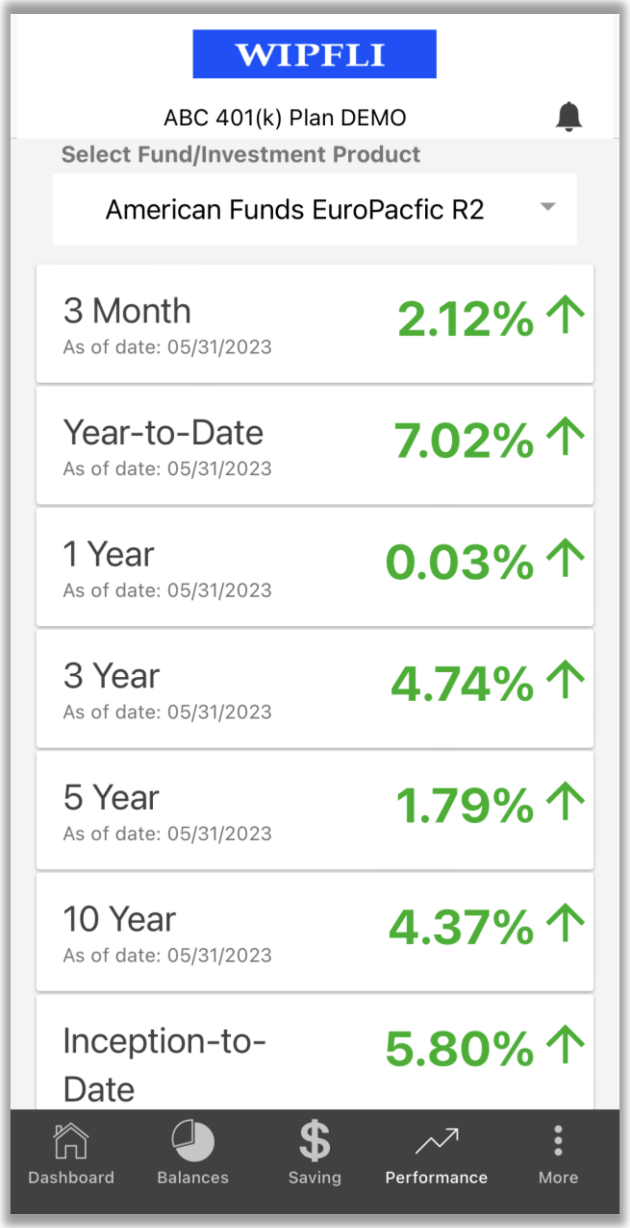




Investment Elections

- Review where new contributions will be invested on the *Investment Elections* tab.
- Select the source to review from the drop-down menu.
- To make changes to your investment elections, log into your account on the participant website at wipfli401k.savetoretire.com.

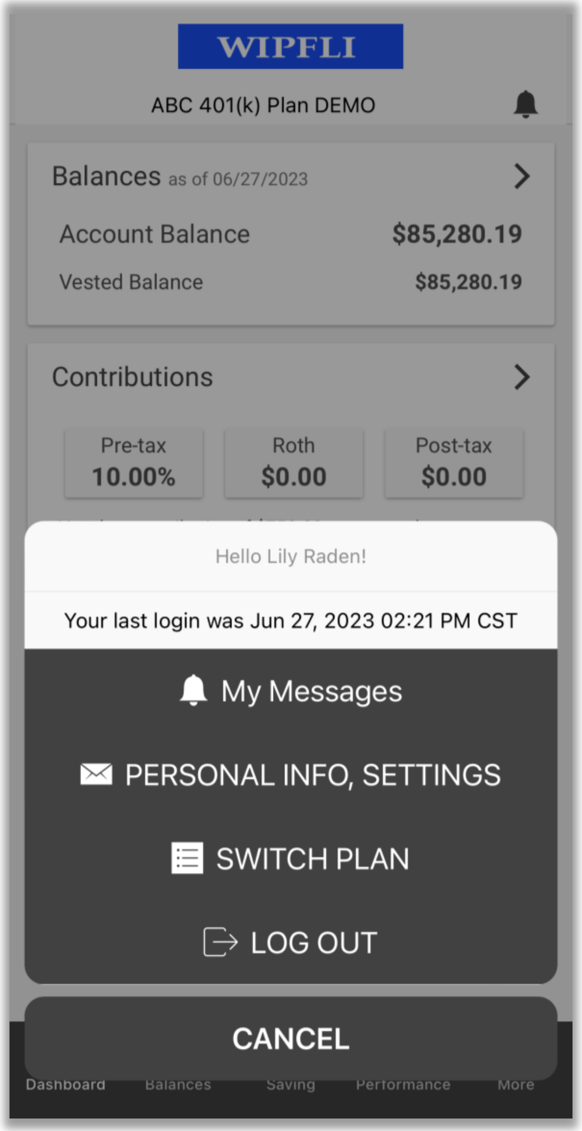




Performance

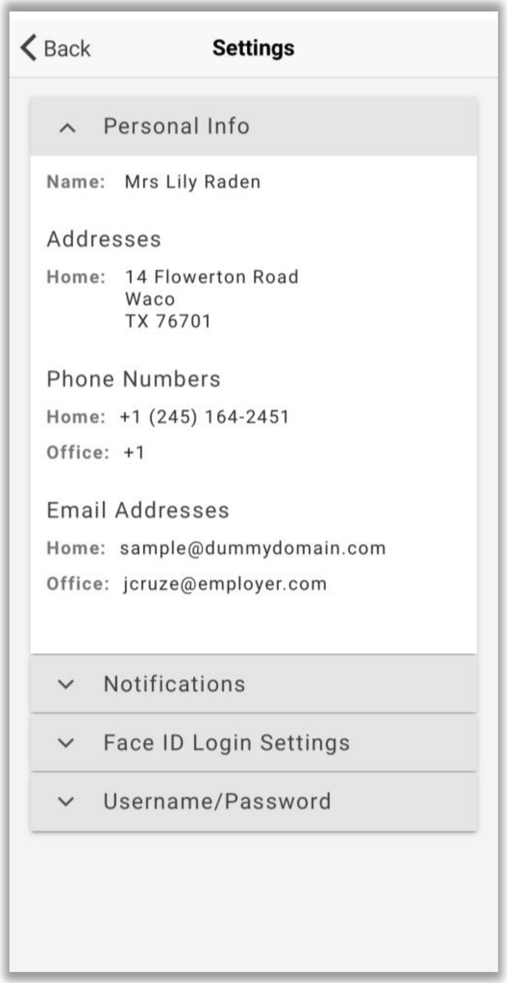
- Select your investment from the drop-down menu at the top change investments.
- The historical performance of your investment is displayed for several timeframes.
- Performance data updates each month.
- The *As of date* is shown below each return to indicate the timing of the data.

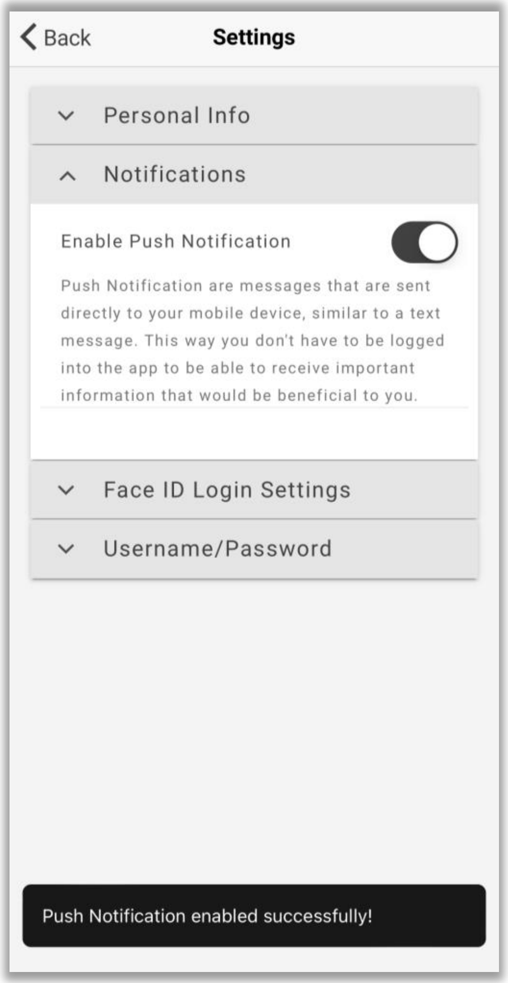
More Options



- Click on the *More* menu on the bottom right to view the additional options.
- *My Messages* option displays notifications on your account similar to the bell icon.
- *Personal Info, Settings* provides personal information to review, notification settings, credentials, and biometric login.
- *Switch Plan* allows you to switch between retirement plans if you are a participant in more than one plan.

Personal Info

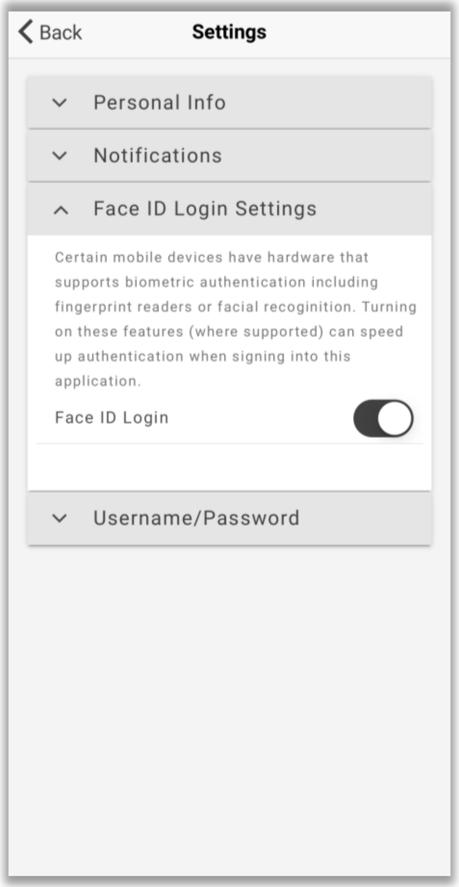


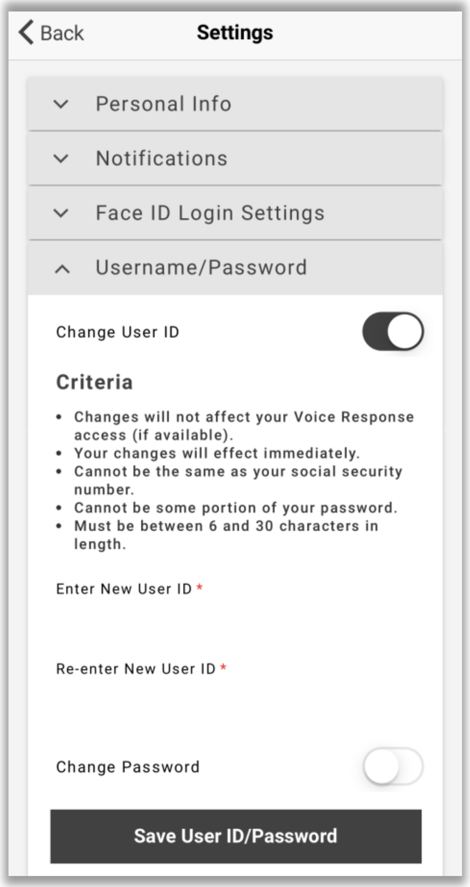


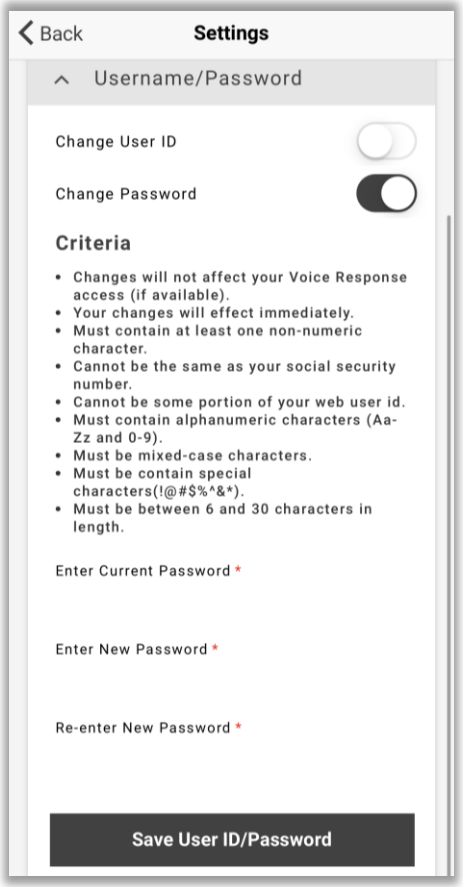
- Review personal information and enable push notifications for your account.
- To make changes to your personal information, log into your account on the participant website at wipfli401k.savetoretire.com.

Updating Credentials

- Click the slider button to enable biometric logins or to change your user ID or password.







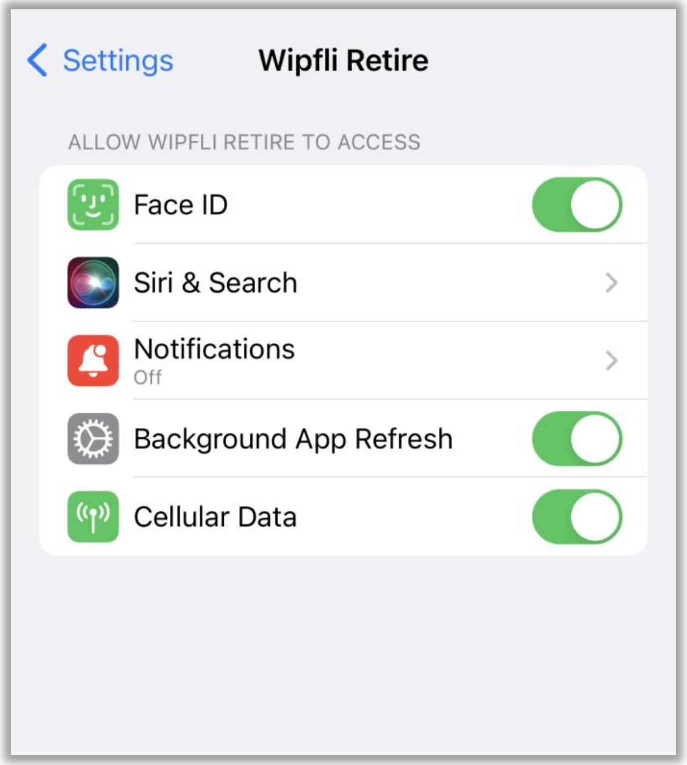
Enabling Face ID

- If you have trouble enabling Face ID through the app, got to Settings on your iPhone.

- Scroll down until you see the Wipfli Retire app.

- Select it and then enable Face ID by clicking the slider.

- You will then be able to utilize Face ID in the mobile app once you login.



Future Enhancements

Retirement Income Tool – 2024

Investment Election Changes

Rebalance/Transfer Investments

Distributions & Loans

- To request an online distribution or loan, visit the Participant Website at the address below to initiate a request.

- wipfli401k.savetoretire.com

- For assistance logging in or requesting a withdrawal, contact our Participant Services Team at **888.333.6315** or using **LiveChat** on the participant website.

Need Assistance

- Contact our Participant Services Team with questions about your account or this tool.

Live Chat

Email:

psateam@savetoretire.com

Phone:

888.333.6315