



**Picture
success.**

JULY – Online Enrollment Process

www.julyservices.com

888.333.5859

Login: www.julyservices.com



A screenshot of the JULY website's login page. The top navigation bar is dark blue with the JULY logo on the left and social media icons (Facebook, LinkedIn, Twitter) and a "Login" link on the right. Below this is a grey navigation bar with tabs for "Home", "About Us", "Advisors", "Employers", "Participants" (highlighted in orange), and "TPAs". A dropdown menu is open under "Participants", listing "Participants", "Employers", "Advisors", and "TPAs". The main content area has a green background with a photo of a family. It contains a login form with "English | Spanish" language options, "User Name" and "Password" input fields, and an orange "Login" button. Below the form is the text "For Participant Assistance call 888.333.5859, Option 1". To the right of the form are links for "Forgot Password?", "Enroll Now!", "Website Announcements", "Security Information", and "Compatibility Test". A green footer bar at the bottom contains a globe icon and the word "Participants". Orange circles highlight the "Participants" dropdown menu and the login form area.

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

A screenshot of a web application's security setup page. The page has a blue header with the JULY logo on the left and the text "Welcome, Paul Remick" on the right. Below the header is a dark grey navigation bar with a white hamburger menu icon. The main content area is white and contains the following elements:

- Security Setup**: A heading with a "Print" icon to its right.
- Text**: "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**: A section heading.
- Question 1**: A dropdown menu with the text "What is your father's mi" and a red asterisk.
- Answer**: A text input field with a red asterisk.
- Question 2**: A dropdown menu with the text "What was your first pet" and a red asterisk.
- Answer**: A text input field with a red asterisk.
- SUBMIT**: A blue button with white text.

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

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

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

Step 2 – Designate Beneficiaries



Designate Your Beneficiaries

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@julysecurities.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
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

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

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

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

Security Question

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

Salary Deferral Elections

Pre-tax contributions	Deduct 7.00% each pay period.
Roth 401(k) contributions	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
- Participant Services: 888.333.5859, option 1



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