



HOW TO LOG INTO *your*MONEY

How to log into your account online for the first time

STEP 1: Go to weabenefits.com/yourmoney or click on the "Access yourMONEY" link from our home page, weabenefits.com.

STEP 2: Login to your account.

The first time you sign in:

- ▶ Login ID = Social Security number (no dashes and no spaces)
- ▶ Password = birthday (mmddccyy)

Read and accept the terms and conditions.

STEP 3: Enter you plan's unique security code.

The security code is your plan number. Please refer to your contract summary or email confirmation for the plan code.

STEP 4: Personalize your login ID and password.

You will be prompted to enter an e-mail address, a new user ID, and a new password. If you do not update your username and password, your account will be locked for security purposes within 90 days. If your account gets locked you will need to call us.

Please note the specific password requirements:

- ▶ At least 14 characters in length.
- ▶ At most, 50 characters in length.
- ▶ At least 1 alphabetic character.
- ▶ At least 1 alphabetic upper case character.
- ▶ At least 1 numeric character.
- ▶ Cannot repeat your previous 3 passwords.

A confirmation of activity e-mail will be sent to the e-mail address provided.

STEP 5: Enter security questions.

Select two security questions that will allow you to self-service if you forget your user ID or password.

STEP 6: Set up two-factor authentication.

Enter a phone number and select how you would like to receive the verification code (text message or phone call). After you login with your user ID and password, you may be prompted to enter a one-time verification code that will be sent to the designated phone number. After authentication, you will be directed to the My Dashboard page.

DID YOU KNOW?

Two-factor authentication (2FA) adds another layer of security to your account by making sure people trying to access your account are who they say they are. With 2FA, a user is granted access to a website or application only after successfully presenting two or more pieces of evidence to an authentication mechanism.



WHAT'S INSIDE *your* MONEY

Easy online access to your 403(b) and IRA accounts

My Dashboard
Account information at-a-glance.

The screenshot shows the 'My Dashboard' page with the following elements:

- Header: WEA Member Benefits logo, user ID (HI FNAME0371904 X LNAME0371904), and navigation links (Resources, Support, My Profile, Logout).
- Navigation: My Dashboard, My Forecast, My Plans, and a SHORTCUTS dropdown.
- Balance Card: Shows a Vested Balance of \$2,183.22.
- Performance Card: Shows a 0.4% return from Nov 9, 2017 to Nov 8, 2018.
- Transactions Card: States 'No transactions in the last 30 days'.
- Statements Card: Shows 'Statement on Demand Available'.
- Footer: Links for Terms & Conditions, Privacy Information, and Security.

My Profile
Review and update personal information (address, phone number), and opt to receive electronic statements.

The screenshot shows the 'My Forecast' page with the following elements:

- Navigation: My Dashboard, My Forecast, My Plans, and a SHORTCUTS dropdown.
- My Retirement Goals: Includes Target Retirement Age (67), Years in Retirement (17), and Retirement Monthly Income (100% of salary or \$3,750).
- Model Changes: Includes a slider for contribution rate (0% to 100%) and investment allocation.
- My Modeled Retirement Forecast: Shows a Monthly Goal of \$3,750 and performance metrics for Average Market and Floor Market.

My Forecast
Create and track your personal financial plan or project your retirement income gap or excess with our interactive online retirement goal planner and other tools.

My Plan
See details about your investment allocations, performance, transactions, and more.

The screenshot shows the 'My Plan' page with the following elements:

- Navigation: My Dashboard, My Forecast, My Plans, and a SHORTCUTS dropdown.
- Plan Name: MILWAUKEE PUBLIC SCHOOLS.
- Chart Filters and Period: Set to 01/04/2016 - 11/09/2018. Personal Rate of Return: 25.72%, Annualized: 8.35%.
- Allocation by Source: A pie chart showing 54.19% for EMPLOYEE PRE-TAX ROLLOVER and 45.81% for ROTH DEFERRAL.
- Net Investment vs. Market Value: A line graph comparing the plan's performance against a market index.



The 403(b) retirement program is offered by the WEA TSA Trust. TSA program registered representatives are licensed through WEA Investment Services, Inc., member FINRA. The Trustee Custodian for the WEA Member Benefits IRA accounts is Newport Trust Company. TSA 4456-280-0721 (W)