



HOW TO FUND YOUR IRA ACCOUNT

STEP 1: Log in to yourMONEY™ account at **weabenefitsretirement.com**.

STEP 2: Once you're logged in, click **FUND MY ACCOUNT** to launch the iJoin tool.

The screenshot shows the WEA Member Benefits dashboard. The top navigation bar includes 'Dashboard', 'Close Call', 'Manage', 'Plan', 'Performance', 'Forms & Reports', and 'Plan Selection'. The main content area is titled 'My Dashboard' and contains a message: 'Click the 'Fund My Account' button to add contributions to your IRA account.' The 'FUND MY ACCOUNT' button is highlighted with a red box. A modal window titled 'iJoin Goal-Based Retirement Income' is open, showing a 'CONTINUE' button also highlighted with a red box.

STEP 3: Add or edit your **BANK ACCOUNT**. You can add multiple accounts.

The screenshot shows the 'BANK ACCOUNTS' section. A plus sign icon is highlighted with a red box and an arrow. Below it is a form titled 'ADD BANK ACCOUNT' with the following fields:

- First Name *
- Last Name *
- Account Type *
- Account Number *
- ABA Routing Number *
- Financial Institution *
- Default? *
- Are you an account holder on the external bank account? *

At the bottom of the form are 'CANCEL' and 'SAVE' buttons.

You will need to click on the plus sign to access the "add a bank account" form.

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STEP 4: You will be given the opportunity to create a one-time or monthly transaction when you choose to Add or Edit in the **REOCCURRING TRANSACTIONS** section. Choose an End Date if you want the contributions to process for a specific time frame. If you leave End Date blank, the monthly contributions will continue to pull from your named financial institution. End Date is not applicable to one-time ACH requests.

You can stop, start, and edit your transactions as needed.

REOCCURRING TRANSACTIONS



Add Transaction

Transaction Type *

Contribution

Amount *

\$0.00

From Account *

Frequency *

Monthly

Day *

Effective Date *

MM/DD/YYYY

End Date

MM/DD/YYYY

CANCEL

SUBMIT

Frequency *

Monthly

Monthly

One-Time

You will need to click on the plus sign to access the "add transaction" form.

