

Activating Your Account and Making Investment Elections



USING THE INTERNET



You can enroll in your retirement plan, activate your account, make your investment elections for future payroll contributions and more **online**. Please have your investment elections ready before you access the DailyAccess web-based system. The first time you access the system you will activate your retirement account and make investment elections for future payroll contributions. *Talk to your financial advisor for assistance in choosing the investment elections that may be right for you.*

Click “Next” at the bottom of each screen to advance to the next page.
Scroll your mouse over key terms to read their definitions.

Go to **www.teamsterslocal25.com** and click on the **Member Benefits** tab

- Under New Users, select **Enroll Now**.
- Select your language preference, English or Spanish.

Supply your unique identifying information

- Provide the last four digits of your Social Security number, year of birth, last name.
- Provide a Username and Password and select three Security Questions.
- Select from a number of Personal Preference settings for future use and provide your e-mail address.

Tell us where to invest your money

- Select your contribution rate (the amount you wish to have withheld each pay period).
- Select your investment elections. If you choose the Change Elections by Investment or Change Elections by Source option, the next screen will provide a list of investment options available in your plan.
- Rebalance your account to your investment elections (optional).

Finalize and submit

- Review all the information you have submitted and print a copy for your records.
- Choose **Complete Enrollment** to submit your selections and activate your account (exiting without choosing Complete Enrollment will result in a failure to process your investment elections or establish your account).

Need help?

Please call the DailyAccess Support Center toll free at **888.307.4015** or e-mail **support@dailyaccess.com**.
Monday – Friday, 8:00 am – 8:00 pm Eastern

Our support specialists cannot provide investment advice. If you have questions about the investment options provided by your plan, please contact your plan’s financial advisor, plan sponsor, or human resources professional. All financial transactions will be processed in order of request as of stock market close on the same business day.

Activating Your Account and Making Investment Elections



USING THE TELEPHONE



You can enroll in your retirement plan, activate your account, make your investment elections for future payroll contributions and more **by telephone**. Please have your investment elections ready before you access the DailyAccess automated telephone information system. The first time you access the system you will activate your retirement account and make investment elections for future payroll contributions. *Talk to your financial advisor for assistance in choosing the investment elections that may be right for you.*

Call **800.217.2240**

- Select your language preference at the voice prompt, **1 for English or 2 for Spanish**.

Supply your unique identifying information

The first time you access the system, your PIN will be the last four numbers of your Social Security number. Please have a new PIN ready.

- When prompted, enter your Social Security number using the telephone keypad. Then enter the last four digits of your Social Security number again as your PIN.
- When prompted, enter your new PIN. You will receive a confirmation number.

Prompts will then direct you

To make *investment elections* for the first time, for *future payroll contributions only* - this does not move or change any pre-existing account balances.

- Press 1 to access your personal account information.
- Then press 2 to access investment information.
- Press 2 to change your investment election information.

Make investment elections

Please Listen carefully. Some plans offer the option to select investment elections by fund or by source. A list of the investment elections available in your plan will be presented.

- To invest in a fund, enter the percent in whole numbers, followed by the # sign.
- To skip an investment, press the # sign only.

When your investment elections total 100%, the system will repeat the choices you have entered.

Confirm investment elections

- Press 1 to confirm your investment elections. The voice prompt will return you to the previous menu without further confirmation.
- Press 9 to cancel. The voice prompt will return you to the main menu.

To exit the system, hang up. Each time you make a change on the automated telephone information system, a confirmation letter will be mailed to your home address on file via the U.S. Postal Service.

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