

## New User (First Time Log In Only) ①

- Log onto [www.usicg.com](http://www.usicg.com)
- Click **Retirement Account Access** (➔)
- Click New Registration
- Login ID: Enter Social Security Number
- Password: Enter Date of Birth in MMDDYYYY format
- Follow prompts to complete setup & access account

## Existing User (Ongoing Account Log In) ①

- Log onto [www.usicg.com](http://www.usicg.com)
- Click **Retirement Account Access** (➔)
- Click Participant Login/Sign On
- Enter Login ID and Password then click Log In
- Enter security code sent by system then click Continue

## Features

Once you have logged on, you have access to a wide range of options found in the drop-down menus along the top of the screen.

After clicking many of the menu options, you will see available actions on the lower portion of your screen. Use your mouse to scroll over each action to view a brief description of that feature and/or click "Take Me There" to initiate that action in your account. Menu options include:

### HOME

- **Your Account** provides you an overview of the *Current Balance, YTD Savings, YTD Return, Your Portfolio, and Investment Allocation*
- To **View All Activity** allows you to download your *Transaction History*

### MANAGE

- There is the ability to manage current investments in **Your Portfolio** by
  - changing the way investment positions under *Portfolio Rebalance*
  - setting your portfolio to *Auto Rebalance* specific to your asset allocation
  - make an *Investment Transfer* to sell or reinvest
- To **Manage Contributions**, you may choose *Investment Elections*
- You can **Review My Current Loan** (if applicable), or choose *Loan Modeling* if you need to **Withdraw** funds from your account

### VIEW

- **Performance & Statements** to generate a *Statement on Demand* for a selected date range, print *quarterly Statements & Disclosures*, or review the plan's *Personal Performance*
- To download *Tax Forms* choose the **1099-R Forms**
- The quarterly **Newsletter** is a good reference available with current information

### LEARN

- The **Learn & Advice** will provide you with market data results and *Investment Performance*
- **Quarterly Newsletters** link you to articles on various retirement and investment topics
- Check out the **Market Update** for the latest on the various market and economic information

### KNOX COUNTY WEB LINKS

- Visit the **Distribution & Estimate Portal** to determine available balance to receive or rollover
  - Refer to page 2 for instructions
- Find who to contact, forms, or retirement options at **Knox Retirement Website**

### RESOURCE CENTER

Provides you the ability to understand **Investing for Retirement in a Volatile Market**, the **Investment Glossary** at Investor.gov, access the **Internal Revenue Service** for forms and instructions, to signing up with the **Social Security Administration** or access the **Financial Market Info**.

The screenshot shows the website for USI Consulting Group. At the top, the URL [www.usicg.com](http://www.usicg.com) is displayed. Below the logo, the tagline "UNDERSTAND • SERVICE • INNOVATE" is present. A navigation bar includes links for Home, About Us, Contact Us, Services, Publications, News & Events, Industry Links, and Careers. A main banner reads "Your Ideal Answer for all Retirement & Employee Benefit Plan Services" with icons for various services like Defined Benefit, Defined Contribution, Investment Advisory, Church Plan Solutions, Tribal Plan Solutions, Executive Benefits, Regulatory & Compliance, Employee Communications, and Health & Welfare Administration. A "Direct Solutions" dropdown menu is open, showing options like Retirement Account Access, Retirement Income Planning, and HELP links. A red circle with the number 1 highlights the "Retirement Account Access" option in the dropdown menu.

## Voice Response System

### Retirement Information at Your Fingertips

With Direct Line, you are in control of reviewing your retirement account any time you choose. You can obtain key information about your retirement account 24 hours a day, 7 days a week. Once you have entered the system, listen carefully to the main menu options. You will be asked to make a selection, and the system will automatically transfer you and voice the requested information.

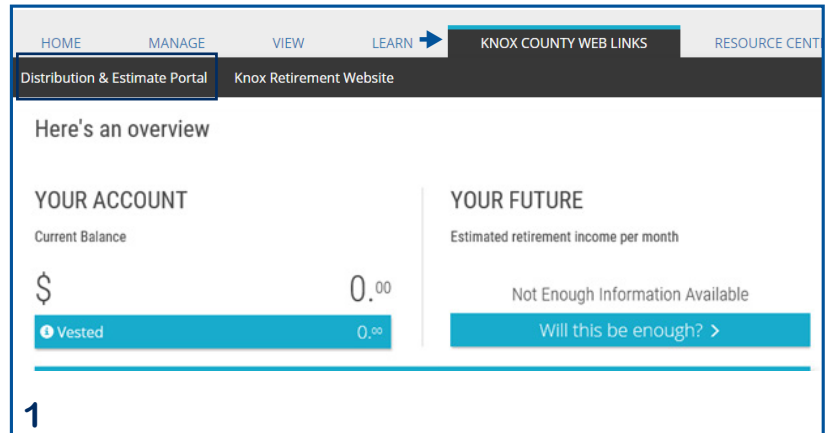
### Accessing Your Account

- Call 1-877-220-8997 on your touch-tone phone. You will be greeted and guided through each system function.
- To access your account, enter your Social Security Number followed by your PIN.
- Follow the system prompts to select menu options by pressing the appropriate keys on your phone.

If you have any additional questions or need your PIN reset please contact USI Consulting Group's toll-free customer service line at (866) 305-8846, plan code 524, available Monday to Friday from 8:00 am to 5:00 pm ET.

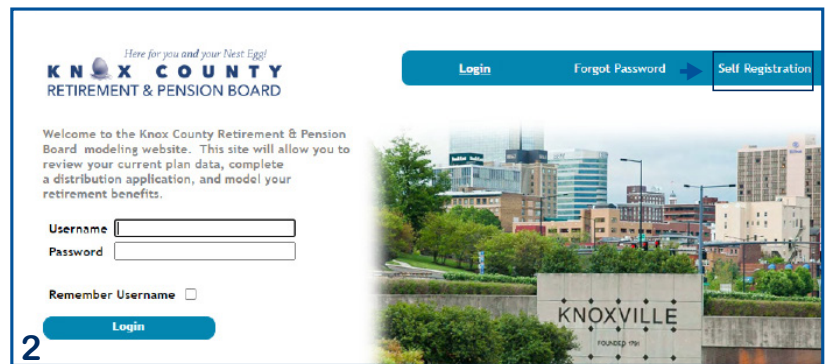
## Step 1 Follow *Blue arrow* (➡)

- Click the [Distribution & Estimate Portal](#) link after selecting the "Knox County Web Links" tab as showed on the right.



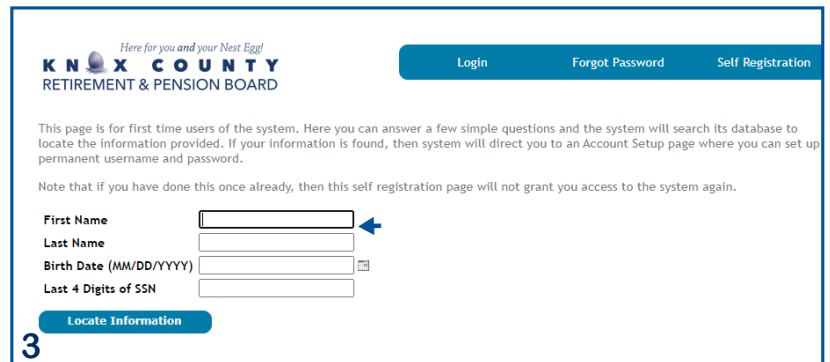
## Step 2 Follow *Blue arrow* (➡)

- If you have not logged on before, you must complete Self Registration
- Click [Self Registration](#) to set up Username and password
- After clicking, a form will appear for which you will have to fill out the appropriate information.



## Step 3 Follow *Blue arrow* (➡)

- Fill out the appropriate information displayed in the form
- You will complete the ID and password set up here. Remember that you may make the logon details the same or different than your [www.usicg.com](http://www.usicg.com) logon.



## Step 4 - Login if you've already performed [Self-Registration](#).

### You made it!

- A welcome screen will appear and a number of actions will be available that include:
  - Review your Personal Data
  - Run an estimate
  - Submit forms

