Paychex 401(k) Quick Enroll

Easily access your retirement account through our online portal or mobile app with <u>Quick Enroll</u>. Learn how!

A 401(k) plan is an easy, affordable way to save for your retirement — and the sooner you start the more you may save. Learn how to enroll today with the Paychex Quick Enroll feature. Si prefieres las instrucciones en español, mira este video.

- 1. Log into the Paychex Retirement Services website at <u>paychexflex.com</u> and select **My Retirement**. To access your plan on your mobile device, download the <u>Paychex Flex mobile app</u>.
- 2. When the Start Your Retirement Plan tile displays, click Get Started.



3. Under Start My Enrollment, select Enroll Now.

Note: If your employer has automatic enrollment, you will see the option to **Make Changes** to the pre-selected deferral amount and investments.





4. In the Select Your Contribution Rate screen, input the contribution rate and review/update salary Contribution Investments Review & Submit amount, then select Continue. Select Your Contribution Rate Your contribution level has a big impact on your retirement. Your contribution is the amount you take out of each paycheck to fund your retirement. The contribution percentage and retirement age defaulted below is for illustrative purposes only and should be customized to meet Select Your Contribution Rate Your contribution level has a big impact on your retirement. Your contribution is the amount you take out of each paycheck to fund your retirement. The contribution percentage and retirement age defaulted below is for illustrative purposes only and should be customized to meet your own retirement goals. vour own retirement goals. Customize Test what contribution levels work for you Contribution Info 8% Pretax contribution Roth contribution 0% act to paycheck about \$62 5. In the Select Your Investment Method screen, choose to select your own investments (Do it Retirement age 65 yourself) or use the plan default investment. Click Calculate Select next to the method you want to use, and Retirement Income click Continue. Strong Market \$996 \$993 Average Market - ()) \oslash O -Weak Market \$986 Contribution Investments Review & Submit Your monthly after-tax retirement income in today's dollars Investment: your plan's participant default investment Select Your Investment Method How is this calculated? Choosing the investments where your hard-earned money will grow is an important step towards saving for your retirement. Back Continue Select Use the default investment Are you not sure of what investments to choose? This option might be for you if you prefer to have all of your funds invested in the default investment Default Investment T. Rowe Price Retirement 2025 R 100% Select Do it yourself Do you want to have complete control over choosing your investments? If you prefer to research your own investments and manage the allocation mix yourself, this option might be for you. What you need to do · Select the investments that you would like to participate in. · Determine the percentage of your contribution you would like in each selected investment. Back Next Up: Review & Submit



6. If you choose to select your own investments, the **Select Your Allocations** screen will display. Ensure the **Total** % of investments equals 100%, and when complete, click **Continue**.

Contribution Select Please s	Investments t Your Allocations select how you would like to divide up ents available to you in your plan. The continue.	Review & Submit
s s Select	t Your Allocations select how you would like to divide up ents available to you in your plan. The continue.	your contribution into the allocations must total
investme 100% to		
Available Investmen	ts	
Investment Names		Total: 0%
Bond		
Fidelity Advisor Strategic In	icome M	0 %
Pimco Total Return A		0 %
Templeton Global Bond A		0 %
Vanguard Lifestrategy Mod	erate Growth Inv	0 %
Vanguard Mid-Cap Value In	idex Inv	0 %
Vanguard Small Cap Index	Inv	0 %
Money Market		
T. Rowe Price Government	Money	0 %
		Total: 0%
Back		Continue



7. Verify your investment selections and percentages. If they are correct, click **Submit**.

Contribution	Investments	Review & Submit
	Let's Review Your Enrollment Info Please review and confirm your enrollment selections	
Enrollment Se	ection	
Contribution start d	ate Jul 17	
Investment selection	Fidelity Advisor Strategic Income	M 100%
Back		Submit

8. From the enrollment confirmation, print and complete the Beneficiary Form and return it to your employer.



9. If you want the Auto Contribution Increase option, choose your preference and click Save.

Auto Increase Preferences			
	C	ancel	
1	How Auto Contribution Increase Works When on, the increase continues each y plan's 96% limit. Change your 401(k) cor whether it's on or off. 2 weeks before an auto increase on that you get an email to review it.	ear, up to your tribution contribution,	
Use auto increase: O	FF		
Pretax increase amou	unt	1 %	
Roth increase amoun	t	1 %	
Next scheduled contr	ibution increase	Jul 17, 2020	

