Fisher Investments®
401(k) Solutions

How to Get Enrolled

Follow these instructions to enroll in Your 401(k) Plan.

STEP 1 Create your account

Register and access the enrollment website for the first time.

- Website: **www.fisher401k.com/login**
- Enter a **User Name and Password**. If you are a first-time user:
    - Your user name is your full Social Security Number with no dashes.
    - Your password is your date of birth (MMDDYYYY).
    - Click on **"Sign In."** Once logged in, you'll be asked to create a new user name and password.
- A **Terms & Conditions Acknowledgment** page appears. **Click on "Accept"** to continue the enrollment process.
- A **"Welcome"** window will appear. **Click "Next"** to continue.
- **Add your email address** to receive statements. **Click "Next"** to continue.
- **Create** a new User ID. Click **"Next"** to continue.
- **Create** a new Password. Click **"Next"** to continue.
- **Select** two Security Questions. Click **"Next"** to continue.
- You'll be prompted to **provide a phone number.**
    - You will receive a one-time code through the phone number you provided to complete the registration.
- **Enter the verification code** received and **click "Verify Code"** to continue.

STEP 2 Enroll in your company's retirement plan

Make key decisions about your 401(k) account.

- **An Enrollment Page** will launch after completing the registration process. **Step 1** (Getting Started) and **2** (My Forecast) are **optional.**
- In **Step 3**, you will **Select your contribution rate**. Click on **"Continue to My Invesment Choices."**
- **Complete the Fisher Investments' Retirement Navigator** online questionnaire **(optional)**. The Retirement Navigator takes about 10-15 minutes to complete and will ask you simple questions regarding your unique retirement goals. Based on your answers, it will identify a model portfolio for you to consider.
- In **Step 4**, you will **make your investment selections** from the following options:
  - **Automatic Investing**—Select if you would like your account to be invested in a default portfolio based on your age.
  - **Model Portfolio**—Enter the model portfolio you chose during the Retirement Navigator questionnaire here, or another if you prefer.
  - **My Own Investment Choices**—Select this option if you would like to make your own asset allocation elections from the available fund menu.
- In **Step 5**, you will **confirm your information** is correct and **select your beneficiaries**. **Click on "Continue"** to review your summary page.
- **Review your summary** confirmation and **select "Complete Enrollment"** to complete online enrollment.

Would you like some help? Reach out to us.

Schedule a 30-minute one-on-one meeting with a Retirement Specialist.
Your Retirement Specialist has a great deal of experience with helping employees plan for a successful retirement. They can help you get enrolled as well as provide educational support and guidance.

Schedule your meeting now!

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