

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: <https://paychexflex.com>
- Click "**Sign-Up.**"
- In **Step 1**, you'll **provide your personal information**. When complete, select "Continue."
 - You'll be prompted to confirm the accuracy of the information you provided. Review the information and select "Yes" if it's accurate.
- In **Step 2**, you'll **choose four security questions**. When complete, select "Continue."
- In **Step 3**, you'll **decide the security level for your account**. When complete, select the box next to "I acknowledge" and click "Continue."
- In **Step 4**, you'll **set up your account information**. You'll be prompted to create a Username, Password, and PIN, as well as provide an email address.
- In **Step 5**, you'll be prompted to check your email. Click the link to **verify your email address** and to **activate your account**.

STEP 2 Enroll in your company's retirement plan

Make key decisions about your 401(k) account.

- Once you've logged in to the retirement services benefits website, **select the Retirement Services tab and click "Enroll Now!"**
- **Review** the Participant Fee Disclosure and select how you'd like to receive future Participant Fee Disclosures.
- **Verify** your birth date.
- **Set your deferral rate**, or how much you'd like to contribute towards your 401(k).
- **Complete the Fisher Investments Retirement Navigator online questionnaire** (optional).
- Make your **investment selections**.
- Print your beneficiary form to **designate your beneficiaries**. Return to your employer once completed.
- **Review your contributions and investment selections**. Select "Submit" to complete your 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!