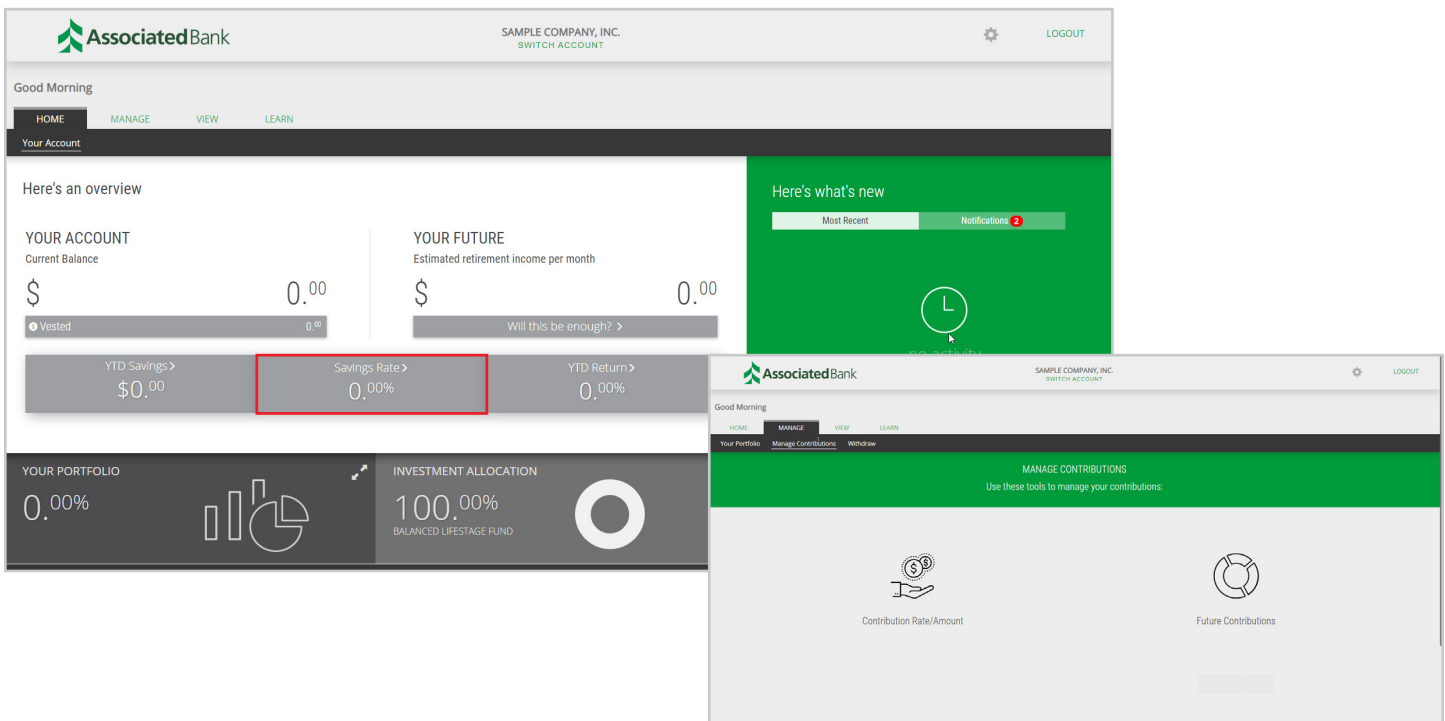


CHANGE DEFERRAL RATE

The amount you contribute to your retirement account is critical when it comes to determining whether you will generate enough savings to meet your retirement goals. A small change now can have a big impact to your account balance and retirement outcome in the future. To determine how changing your deferral rate will impact your account balance and your paycheck, log into your retirement account and go to the Resources tab, Click on Advice & Performance > Mastery Point Guidance to access helpful calculators and tools.

To change your Deferral Rate, click on Savings Rate from the Home Page. Click on Contribution Rate/Amount.



The image displays two screenshots of the Associated Bank retirement account dashboard. The top screenshot shows the 'Your Account' overview page. The 'Savings Rate' is highlighted with a red box, showing a value of 0.00%. Below it, the 'YTD Return' is also 0.00%. The bottom screenshot shows the 'MANAGE CONTRIBUTIONS' page, where the 'Contribution Rate/Amount' option is selected, indicated by a blue highlight.

If your plan allows both percentage and dollar amount changes, choose the type of deferral from the dropdown menu and click Change Deferral.

The screenshots show the 'Deferral Changes' page. The left screenshot shows the 'SELECT DEFERRAL TYPE' dropdown menu with 'Change Deferral by Percent' selected. The right screenshot shows the 'Employee Deferral' section with a table of account values:

SOURCE NAME	CURRENT VALUE
ELECTIVE DEFERRAL ACCOUNT	0%
ROTH DEFERRAL ACCOUNT	0%
Total	0%

Enter the amount you'd like deferred from your annual salary for each available plan listed and click Submit Deferral Change.

Once your request is submitted, you will receive a Deferral Confirmation screen with a confirmation number. There will also be a Pending Activity indicator in the Here's what's new section on the Home Page. You will receive a confirmation via email or by mail based upon preferences you established in the Profile section. Your new deferral election will then be provided back to your employer and will be effective as soon as administratively feasible.

The screenshot shows the 'Request Successful' confirmation screen. It includes the following information:

- Request Successful**
- Deferral Confirmation (12/18/2019)**
- Your deferral changes are now pending. Request Successful
- Confirmation For**
SAMPLE
100 W WISCONSIN AVE
NEENAH, WI 54956-3012
- s
- Your Confirmation Number**
a878adf
- PENDING VALUE**

PENDING VALUE	
ELECTIVE DEFERRAL ACCOUNT	6%
ROTH DEFERRAL ACCOUNT	0%

The screenshot shows the 'Here's what's new' section on the Home Page. It includes the following information:

- Here's what's new**
- Most Recent
- Notifications **2**
- PENDING ACTIVITY** >

If you have any questions, please call our 24/7/365 Customer Care team at 800-431-4649.



Contact Us

Call our 24/7/365 Customer Care Center at 800-431-4649

Visit 40Ik.AssociatedBank.com



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