

How to Set Up Online Access

Your guide for setting up online access to your retirement account.

- 1 Go to <https://retirement.financialtrans.com/msq/>
- 2 On the landing page, go to Need Access? Start here.
- 3 Click **Start here**.

- 4 Enter your **Social Security Number** and **Date of Birth** without dashes or slashes.
- 5 Click **Submit**.

- 6 **Check the box** to accept the Terms and Conditions.
- 7 Click **Accept**.

2 | How to Set Up Online Access

8 Create your **New User ID**.

- Note that it must be at least **8 characters long** and can't contain @.

9 Create your **New Password** and **reenter** it to confirm.

- Note that it must be at least **10 characters long** and contain at least **2 letters, 2 numbers**, and **2 special characters**.

10 Click **Continue**.

New User
Login Security

Personalize Your Login Information

Customize Your User ID

Please follow the prompts below to create your username and password to manage your account online.

8 New User ID

Create Your Password

9 New Password

Confirm Your New Password

10 Continue

11 Select a delivery method for your Security Code:

- For **Mobile**, enter your mobile number.
Check the box to accept the Terms and Conditions. Then click **Add Contact Method**.
- For **Email**, enter your email address. Then click **Add Contact Method**.

New User

Next, Tell Us Where You Would Like to Receive Your Security Code

We'll send you a passcode to your mobile or email when we need to verify it's you.

Select a Security Delivery Method:

11a Mobile
 Email

Enter Mobile Number (numbers only)

Text Message and Data Rates May Apply

By checking this box, you agree to the [Terms and Conditions](#).
MissionSquare Retirement Plan Services account alerts will be sent to your phone from #23200 and you will receive only one message per interaction. Message and data rates may apply.

Add Contact Method

New User

Next, Tell Us Where You Would Like to Receive Your Security Code

We'll send you a passcode to your mobile or email when we need to verify it's you.

Select a Security Delivery Method:

11b Mobile
 Email

Enter [Email]

Add Contact Method

3 | How to Set Up Online Access

12 Enter the **Security Code** you received by text or email.

13 Click **Submit Security Code**.

The screenshot shows a web form titled "Enter Your Security Code". Below the title, it says "Enter the security code we sent to your mobile or email." There is a text input field with a purple "12" icon to its left. Below the input field are two links: "Resend Security Code" and "Add Contact Method". Below these links is another text input field with a purple "13" icon to its left and the text "Submit Security Code" inside the field. Below this field is a "Cancel" link. At the bottom of the form, it says "Your passcode will expire in 4 : 50 minutes".

14 Click **Log In**.

The screenshot shows a confirmation screen titled "Success!". Below the title, it says "Your security profile settings have been saved." There is a large button with a purple "14" icon to its left and the text "Log In" inside the button.

Questions? Contact MissionSquare Plan Services at **(800) 669-7400**.