

Setting Up Personalized Investing

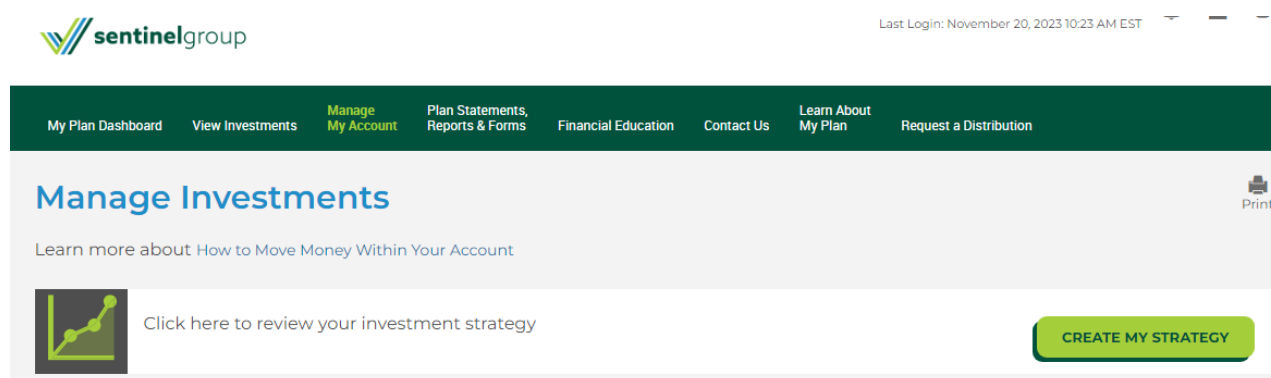
What is personalized investing?

Personalized investing, also known as a managed account, provides a professionally managed retirement strategy personalized to you. This program selects tailored investments from your company's retirement plan fund lineup based on your personal financial picture by considering salary, date of birth, gender, risk preference, Social Security, and more. Sentinel offers a managed account program in partnership with LeafHouse Financial and using iJoin's technology.

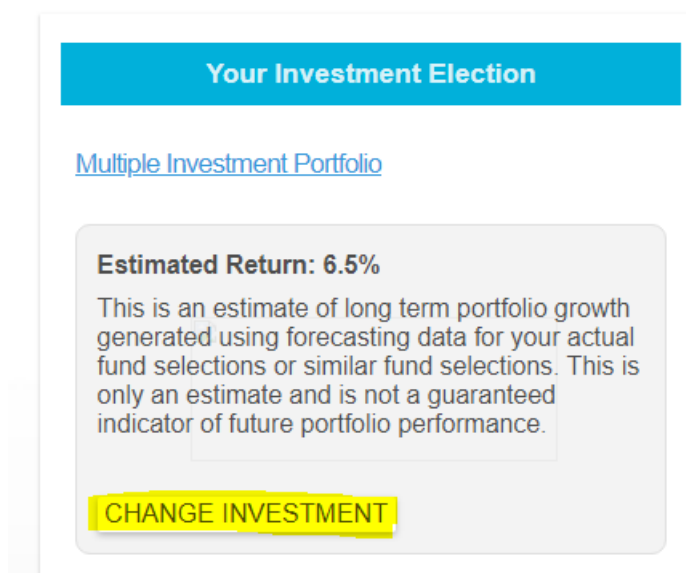
How do I set up my personalized investing strategy?

It's easy! Follow the simple steps below and you'll be on your way:

1. Log into your online account and go to Manage My Account > Manage Investments and click the "Create My Strategy" button to access iJoin.



2. Enter or update the information presented to access Your Retirement Snapshot. From the Your Investment Election section, choose "Change Investment".



3. Select the "Manage It For Me" option. You can also click "Learn More" for more information about the personalized investment option.

Investment Options

Please select how you would like to choose your investments.

My Target Date Investment

[SPA Growth Portfolio CL R6](#)

This option is part of the plan's target date series and matches your expected years to retirement. For a more tailored approach, consider a different option below.

CHOOSE TARGET DATE

Manage It For Me

Hands-off and Personalized

This option will place you into a professionally managed account that is tailored to your exact needs with continuous monitoring to help you achieve your retirement goals. An extra fee may apply to this option. Click the Learn More button for more information.

MANAGE IT FOR ME

LEARN MORE

Choose Myself

Enter Your Own Fund Choices

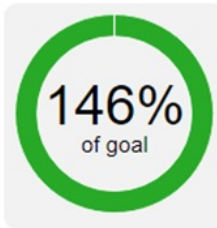
Construct a customized portfolio based on your personal investment objectives and preferences.

CHOOSE MYSELF

4. You will be presented with a model of your personalized investing program to review. Select "Continue Modeling This Strategy" to continue. To finalize your election, click "Implement This Program".

Improve Your Path To Success

Your Projected Retirement Income



Needed at age 67:
\$5,416/mo.
Strategy estimate:
\$7,927/mo.
(not guaranteed)

Monthly Income Sources

[Quick Tips](#)[Advanced Options](#)

Increase Your Contribution Rates

Pre-Tax: 0% Amount Needed: (per month in retirement) \$ 5,416.00

Post-Tax (Roth): 8% Retirement Age: 67

Contribution Type: Percentage ☒ Fixed Dollar

\$215 estimated impact to current bi-weekly paycheck

✓ **Employer Match Optimized!**
Maintain this contribution rate throughout an entire year to receive the maximum employer match (if eligible).

Consider Adjusting These

[Managed Investment Portfolio](#)

Estimated Return: 6.8%

This portfolio is the most appropriate for your current situation. Our recommendation will also change as your circumstances change.

[LEARN MORE](#)

IMPLEMENT THIS PROGRAM

OPT OUT OF THIS PROGRAM

BACK

5. Provide any additional required information, review the investment choices, and then check the box and click "Authorize" to update your savings strategy.

4.90% Cohen & Steers Global Realty I



0.10% MetLife GAC Series 25053 0



Confirm Strategy



I agree to this savings strategy, [associated disclosures](#) and any applicable [account management fees](#).

BACK

AUTHORIZE

A report outlining your personalized investment strategy will be emailed to you.