

Viewing Plan Contributions

You are able to view contributions made by you and your employer through your online account.

1. Once logged into your account online, make sure you are on the My Dashboard page.
2. Scroll down the page until you see the **My Portfolio** section

My Portfolio

View
Overview

Investment Name	Fund ID	Balance
> Aggressive Growth Portfolio		\$0.00
> Managed Allocation - Conservative M...		54.93% \$72,184.00
American Century Strat Allc: Cnsrv ... details	ACCAX	0.07% \$91.42
First Eagle US Value A details	FEVAX	10.98% \$14,421.09
Loan Fund	LOAN	15.22% \$20,000.00
American Funds US Government Sec A details	AMUSX	0.05% \$59.28
Weitz Partners Value Investor details	WPVLX	6.44% \$8,462.36
AMG Managers Special Equity N details	MGSEX	8.92% \$11,716.60

3. Change the 'View' from Overview to Source View

My Portfolio

View
Source View

Investment Name	YTD Contributed	ITD Contributed	Vested Balance	Balance
> Employee Pre-tax Contributions	\$0.00	\$2,450.00	\$2,591.14	1.97% \$2,591.14
> Employer Matching Contribution	\$0.00	\$2,000.00	\$2,000.00	1.52% \$2,000.00
> Employer Profit Sharing	\$0.00	\$0.00	\$72,184.00	54.94% \$72,184.00
> Loan	\$0.00	\$0.00	\$20,000.00	15.23% \$20,000.00
> Rollover	\$0.00	\$0.00	\$34,603.49	26.34% \$34,603.49

4. View sources - YTD (year to date contributions) ITD (inception to date contributions)