

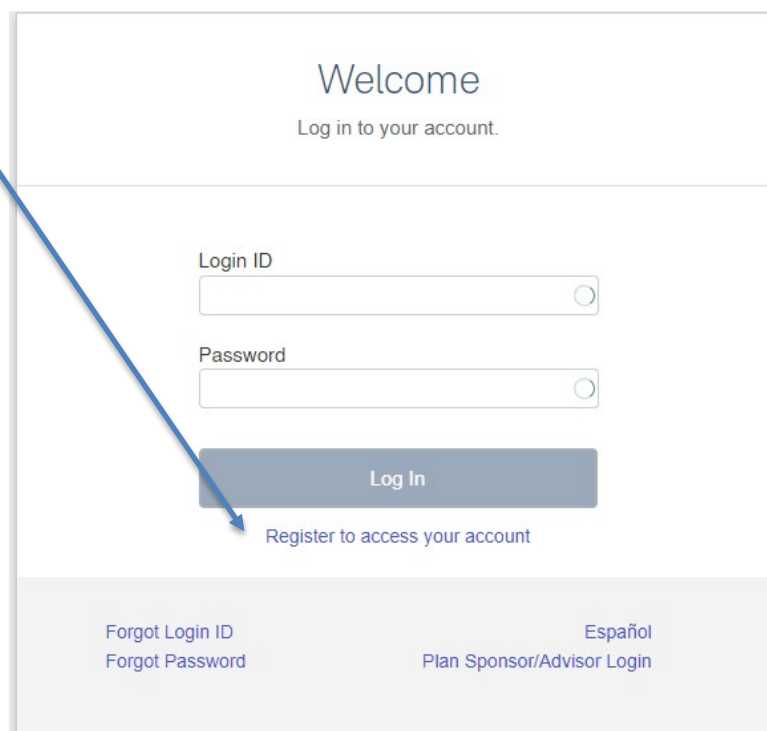
Step 1: How do I access my account?

To log into your account, visit www.heritagepension.com.

- Select “Participant Login” at the bottom of the screen under “Plan Participants.”
- After selecting login, you will be directed to a login screen.



- Click on “Register to access your account.”



Welcome
Log in to your account.

Login ID

Password

[Log In](#)

[Register to access your account](#)

[Forgot Login ID](#)
[Forgot Password](#)

[Español](#)
[Plan Sponsor/Advisor Login](#)



How do I register my account the first time?

The next screen will ask for some basic information about you and your benefits plan. Fill out as much as you can to help the system identify you. Then click **Continue**.

Note: You must enter at least one email address or phone number. We find that second factor authentication works better with mobile phones as opposed to e-mail. If you prefer e-mail and do not receive a message within a couple of minutes, make sure to check your junk or spam folder.

Let's get started

Tell us a little about yourself and your plan.

Help

Personal Information

We need this information to identify you and your account. Use your legal name, not a nickname.

First Name

Last Name

Social Security Number

Confirm Social Security Number

Date of Birth (mm/dd/yyyy)

Contact Information

Please provide at least one way for us to contact you.

Home Phone Number

Mobile Phone Number

Personal Email Address

Workplace Information

If your employer has provided you with this information, e

Plan ID

Plan Passcode

Work Phone Number

Work Email Address

Employee ID

Social Security format uses dashes ###-##-####

Date of birth format uses slashes: mm/dd/yyyy

Phone number format uses dashes ###-###-####

Phone number format uses dashes ###-###-####

Plan ID: 275

Plan Passcode: eth2752023

Do not enter anything for employee ID.

Back

Continue



How do I verify my identity?

After submitting the form, you should receive a security code via email or text message. Enter the security code and then click **Verify**.

The screenshot shows a 'Two-step verification' form. At the top, it says 'Check your email or phone for a security code. This code will expire in 15 minutes.' Below this is a text input field labeled 'Enter Security Code'. Under the field is a link that says 'Didn't receive? [Send a new code](#)'. In the top right corner of the form is a 'Help' link. In the bottom right corner is a 'Verify' button. A blue arrow points from the top right of the form area down to the 'Verify' button.

Note: It may take a few minutes for the code to arrive. If you select email, please check your junk as it routinely goes there.

If you do not receive a code, you can select the option to **Send a new code** or call Heritage Pension Advisors at 1-800-474-0293. We also recommend that you check your junk or spam folder if you supplied your e-mail address.



Then, you'll need to set up your account. Follow the instructions on screen to create a Login ID, password, and security questions. Then click **Continue**.

Note: If you already have an account on our system, you won't see this screen. Instead, you'll be asked to log in using your existing Login ID and password.

Welcome, Jennifer [Help](#)

Create a Login ID and password to complete registration.

Login ID

Confirm Login ID

Password

Confirm Password

Security Question 1
 Select security question

Security Answer 1

Security Question 2
 Select security question

Security Answer 2

Security Question 3
 Select security question

Security Answer 3

[Continue](#)

You should then see this home screen for your account:

Good Afternoon,

[HOME](#) [MANAGE](#) [VIEW](#) [PLAN DOCUMENTS](#) [NOTICES](#) [LEARN](#)

Your Account

Here's an overview

YOUR ACCOUNT
Current Balance: \$0.00
YTD Savings: \$0.00
Savings Rate: 0.00%
YTD Return: Not Enough Information Available

YOUR PORTFOLIO
0.00%

INVESTMENT ELECTIONS
0.00%

VIDEO LEARNING CENTER
Watch and Learn

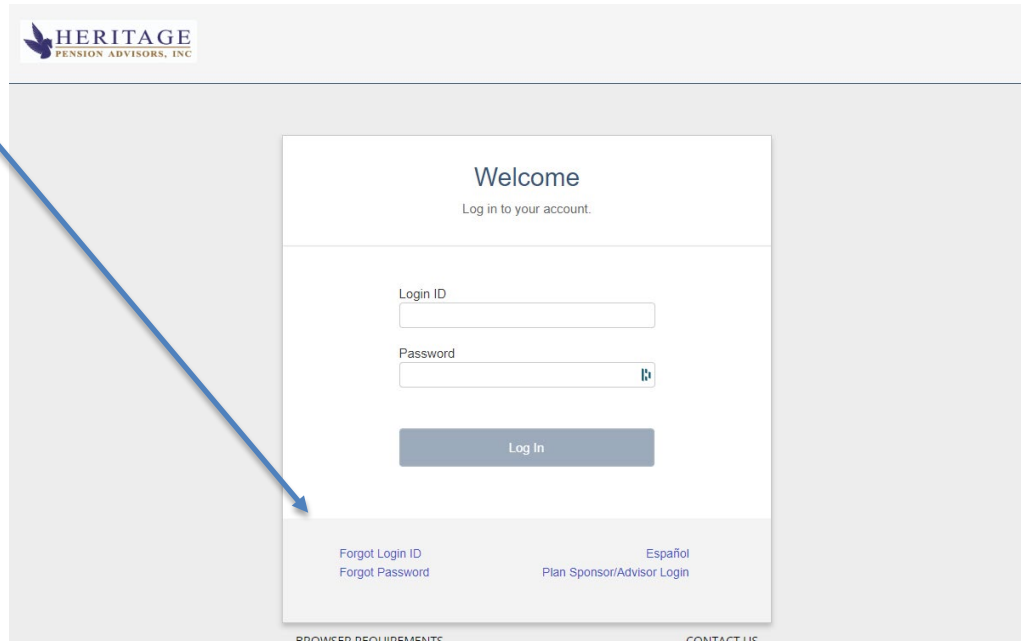
Here's what's new
No recent activity

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What happens if I get locked out of my account?

If you get locked out, select either “Forgot Login ID” or “Forgot Password” on the log in screen.

If you still have trouble, contact Heritage: **1-800-474-0293**.



HERITAGE
PENSION ADVISORS, INC.

Welcome
Log in to your account.

Login ID

Password

Log In

[Forgot Login ID](#)
[Forgot Password](#)

[Español](#)
[Plan Sponsor/Advisor Login](#)

DOCUMENT REQUIREMENTS CONTACT US