

ONLINE

Your CCOERA Online Account

Your quarterly statements, confirmation documents and account information are all available to you online. This means your information is available sooner than printed versions and accessible anywhere electronically, which is much more environmentally friendly and more secure.

Go online and stay on track

The website for your CCOERA Retirement Plans gives you a complete view of your retirement picture and helps make it easy to take positive action. Log on to ccoera.org today to see your savings in a whole new light.

- 1 **View your Lifetime Income ScoreSM**, which tracks your progress toward your unique income replacement goal.
- 2 **Know your estimated monthly retirement income.** Then, use the sliders to adjust your contribution rate (457 plan only), retirement date and investment mix to see the real-time effects of any changes.

- 3 **Compare your retirement savings strategy with that of people like you.**
- 4 **Select your plan name to:**
 - See your balance.
 - Get fund information.
 - Access statements.
 - Find plan-specific documents.
 - Change your investments.
 - Designate your beneficiary.
- 5 **Receive messages on important plan topics.**
- 6 **Click your name to review your contact information, communication preferences and email address.**

CCOERA 50 YEARS

Home My Accounts Me & My Money Guidance

TAYLOR SMITH Log out

Retirement income How do I compare

1 **67%**
of my goal

2 **My estimated retirement income**

TAYLOR SMITH Estimated monthly income: **\$2,278**

Employer contributions \$216	Income gap \$1,129
My savings \$411	Social Security \$1,560

View details

3 **COOERA 401(a) Plan**
\$12,741.00

4 **COOERA 457 Plan**
\$12,741.00

5 **Plan Messaging**
March 16, 2018

CCOERA 457 Plan
Important messages about your retirement plan

Plan savings Social Security Income gap

CCOERA 457 Plan
ESTIMATED ROTH CONTRIBUTION: 3% [+ Add a new contribution]

3% RETIREMENT AGE: 65

FOR ILLUSTRATIVE PURPOSES ONLY

Set up your online account today!

Before you can start taking advantage of everything on the website, you need to sign up online. Here's how:

Step 1. Go to ccoera.org and click *Access Your Account*. Click the *REGISTER* button, select the appropriate tab based on if you have a PIN or not, and follow the prompts to get started. You may call our toll-free number at **800-352-0313**, press 0 twice to speak to a representative and obtain a temporary PIN, which is good for 24 hours.

Step 2. Account creation: Review the instructions to create a username and permanent password.

Step 3. Account authentication: Follow the two-part enhanced security process that involves requesting a verification code be delivered to the device of your choice. After receiving the code, enter it into the enhanced security window on your login device to get to your account home page. In the future, if you want to skip the authentication process for this device, check the *Remember this device* box.

Going forward, go to the CCOERA website, click the *Access Your Account* button, and enter your username and password. Then, if you have not elected to skip the enhanced security authentication process, just request another code to access your account information.

More ways to manage your account

In addition to the website experience, it's as easy as 1-2-3 to access your retirement account by phone with **one toll-free number and the following three great options:**

1) Automated response line

With this touch-tone service, you have 24/7 access to your account. Call the toll-free number below and enter your Social Security number to get started. Then, if requested, add an account extension (1 or 2) and put in your PIN. If you don't have a PIN, simply follow the prompts to create one.

2) CCOERA Plan Service Center

For basic inquiries, investment changes and account transfers, call our call center at the toll-free number below and press 0 after the announcement. Then, say "representative" to speak with a retirement services representative. **Representatives are available from 6 a.m. to 8 p.m. Mountain time, Monday through Friday and 7 a.m. to 3:30 p.m. on Saturdays.**

3) CCOERA Client Services

If you want more personalized retirement and investing counseling, call the toll-free number below and press 0 at the first announcement. Next, say "representative" and then request to be transferred to CCOERA's main office. Or, call CCOERA's main office directly at **303-713-9400** and press 0 to speak to a receptionist who can direct you to CCOERA Client Services.

Upload, fax and mail services

You may also process service requests for your CCOERA retirement account via upload, fax or mail. All necessary account change paperwork can be obtained online and sent directly to our recordkeeper, Empower Retirement, using the upload feature or fax number found on each specific form. You may also use CCOERA's fax number, which is **303-713-9413**. Please note that investment changes may not be made via upload, fax or mail, but only by the toll-free number or online.

**Questions? Call CCOERA toll free at 800-352-0313.
Visit the website at ccoera.org.**

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IMPORTANT: The projections, or other information generated on the website by the investment analysis tool regarding the likelihood of various investment outcomes, are hypothetical in nature. They do not reflect actual investment results and are not guarantees of future results. The results may vary with each use and over time. A top peer is defined as an individual who is at the 90th percentile of the selected age band, salary range and gender.

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