

# Insperity Retirement App User's Guide

View your 401(k) account and current plan information anytime from your Apple or Android device.

## MONITOR YOUR 401(K) ACCOUNT

Using the mobile app for the Insperity<sup>®</sup> Retirement Service Center<sup>SM</sup>, you can:

- View account balances and recent contributions
- View your current rate of return
- Review contribution rates and investment allocations
- Verify loan balances
- Check plan news and alerts

**Your account's security is important to us.**

**Please follow these steps before using the Insperity Retirement App.**

## 1 CREATE A UNIQUE USER ID AND PASSWORD

Before downloading the Insperity Retirement App, create a unique user ID and password for the Insperity Retirement Service Center. Simply log in to the Retirement Service Center via Insperity Premier<sup>™</sup> at [portal.insperity.com](http://portal.insperity.com) and change your user ID and password under the Security tab of the My Information page. Once you have set a new user ID and password, you can log in directly to the Retirement Service Center via [retirement.insperity.com](http://retirement.insperity.com) or the app.

## 3 REGISTER YOUR DEVICE

The first time you log in using your mobile device, you will be asked to register your device through the Retirement Service Center. To register each device you want to use, select the Devices page in the Retirement Service Center, check the box to authorize your device and click the save button. If a device becomes lost or stolen, we recommend that you remove it immediately from the registration list.

## 2 DOWNLOAD THE APP

Use the keywords "Insperity retirement" to search the Apple<sup>®</sup> iTunes<sup>®</sup> Store and the Google Play store to download the app onto your mobile device.



To use the app, you must have a 401(k) account accessible through the Insperity® Retirement Service Center<sup>SM</sup>.

## SYSTEM REQUIREMENTS

To use the Insperity Retirement App, you must have:

- iPhone®, iPad® or iPod touch® with iOS 4.3 or later
- Compatible device with Android 2.3 and up
- Internet connection

## FREQUENTLY ASKED QUESTIONS

### Is there a fee to use the mobile app?

There is no charge from Insperity Retirement Services to download and use the Insperity Retirement App. However, rates from your wireless carrier may apply.

### May I change an investment or my contribution rate using the app?

The Insperity Retirement App offers read-only access to your 401(k) account. To make changes to your account, or to request a loan or withdrawal, visit the Retirement Service Center online or call 866.715.3552, option 3.

### What's the process for logging in and out of the app?

For your security, the app will prompt you to log in each time you open the app. You will remain logged in as long as you keep the app open. Once you close the app, you will be automatically logged out. You should close the app after each use.

### Is my login ID and password for Insperity Premier™ the same for the Retirement Service Center?

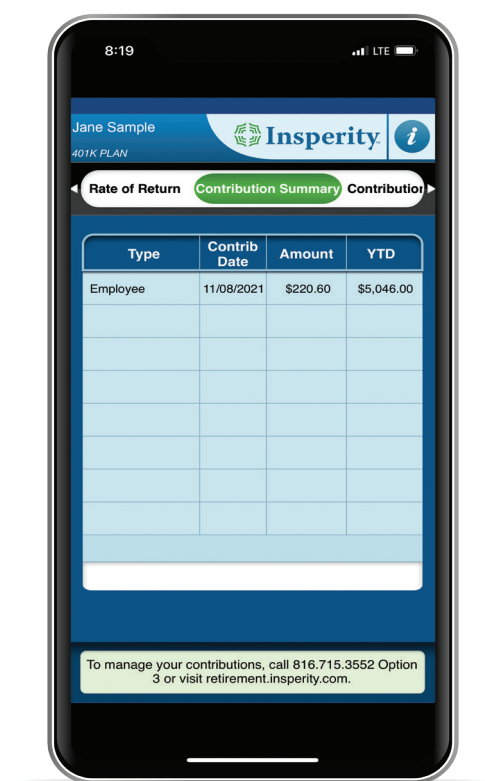
No. Although you can access the Retirement Service Center after you log in to Insperity Premier, you actually have a different user ID and password associated with your Retirement Service Center account. Changing that account ID and password will not affect your Insperity Premier login credentials.

## NAVIGATING THE APP

Use the white navigation bar at the top to view your account information. To scroll through your options, tap ◀ or ▶, then tap a category to view your account information.

Tap the *i* to get contact information for the plan.

The app shows the latest data on your account. To log out of the app, simply close it.



If you have questions about setting up your mobile app, call the Insperity Contact Center at 866.715.3552 and select option 3.

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