

Truvy

www.truvy401k.com

Eligibility

Age – You must be age 18 to participate.

Service - You must be employed for at least 6 months

Entry - You may enroll in the plan any time after the 1st of the month following meeting the age and service requirement

Plan Benefits

Taxes - Plan allows for pre-tax or after-tax (ROTH) contributions

Matching - 100% on first 3% and 50% on next 2%

Vesting - Company matching is 100% vested immediately

Loans - Company allows for 1 loan up to 50% of your balance

1

To enroll or view your 401k account click "Account Access"

ACCOUNT ACCESS

To enroll click "New User?" or to view your account click "LOGIN"

LOGIN

New User? Click Here To Enroll • Forgot Password? • Español

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To enroll enter your enrollment password

New User

Enrollment Password *

Enrollment Password: **TruVis99**

- Enter SSN and Date of Birth
- Setup Security Questions.
- Create a User ID and Password
- Enter a Valid Email Address.

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Enter your Beneficiaries

- If you are married, your spouse must be 100% Primary
- If you are unmarried, you may list any individuals as Primary
- The Contingent Beneficiary is an option if your Primary Beneficiary is unavailable.

Enter your Contributions

- Enter an amount (or zero) in BOTH the Pre-tax and Roth Sections.
- Pre-tax contributions are for participants wanting a tax deduction now, a Roth is for those wanting to avoid taxes in the future.

4

Enter your Investment Selection

- Online Questions
- Age Based
- Do it yourself

Yes, Start my risk tolerance questionnaire.

Lets keep it simple - invest me by my age.

No thanks, I want to choose my own investments.

5

Review and Confirm

- Review the information from each of the previous steps, click **Edit** to change any of your choices.
- Click **Finish** once you are satisfied with your choices.
- To view your account or make changes in the future you may visit truvy401k.com.

Truvy

For questions or advice please contact an adviser

401k@drivewealthadvisers.com

