



# PLATFORM REGISTRATION & ACCOUNT ENROLLMENT

## ESTABLISHING YOUR PROFILE

### STEP 1)

#### Go to [www.tsacg.com](http://www.tsacg.com)

From the home page of TSA Consulting Group's website click on the **ART Login** link located in the center right of the page. Please note if you have already registered for online access to the ART system you may login with your current user credentials and skip to STEP 2.

### STEP 2)

#### Register Online

Enter your Social Security Number (with NO Dashes) as the USER ID and click **LOGIN**. On the next screen you will be prompted to enter a password. Enter your birthdate MMDDYYYY (with NO slashes) as your default password and click **SUBMIT**. You will be directed to a registration page. Please follow the instructions and complete the information on the registration page.

***PLEASE REMEMBER** to write down your personalized user Name and Password.*

### STEP 3)


#### Complete Enrollment


After completing your online registration you will be prompted to select the Plan Type 403(b) which will bring you to the GET STARTED page. The following instructions will guide you through enrolling in the FundPortal 403(b)(7) investment product.


1) Select "I'd like to learn more about my Plan's investment choices."


**Getting Started**


The Investment Provider Xchange (IPX)™ platform was designed to make it easy for you to manage your retirement account. Through the platform you can learn about the investment options available to you, let your employer know how much you want to save from each paycheck, and elect or change the way that you would like your savings to be invested. IPX also provides a directory of authorized agents or financial advisors for your plan and an easy way to contact them. What would you like to do?

 I'd like to learn more about my plan's available investment choices.

 I'd like assistance from an agent or financial advisor.

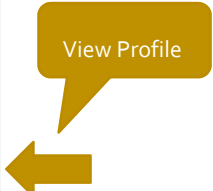
 I'm ready to invest now through regular salary deductions.

 I'm ready to invest now from transfer, exchange or rollover.

 I just want to review information about my account, including balances.

2) From the list of Investment Providers, select "View Profile for FundPortal Investments"

INVESTMENT PROVIDER NAME	NUMBER OF PRODUCTS	VIEW PROVIDER PROFILE
American Century Services, LLC	1	<a href="#">View Profile</a>
ASpire Financial Services	1	<a href="#">View Profile</a>
AXA Equitable Life Insurance Company	1	<a href="#">View Profile</a>
Fidelity	1	<a href="#">View Profile</a>
<b>Fund Portal</b>	1	<a href="#">View Profile</a>
Great American-Annuity Investors Life	1	<a href="#">View Profile</a>
Metropolitan Life Insurance Company	1	<a href="#">View Profile</a>
Midland National Life	1	<a href="#">View Profile</a>
Modern Woodmen of America	1	<a href="#">View Profile</a>
National Life Group	1	<a href="#">View Profile</a>
New York Life Insurance & Annuity Corp.	1	<a href="#">View Profile</a>
PlanMember Services	1	<a href="#">View Profile</a>
ReliaStar Life Insurance Co	1	<a href="#">View Profile</a>
VALIC	1	<a href="#">View Profile</a>
Vanguard Investments	1	<a href="#">View Profile</a>



- 3) From the FundPortal ETF Investment page select "**View Product**"



**INVESTMENT PROVIDER PROFILE**

FundPortal is a mutual fund investment program that affords access to hundreds of mutual funds across brand name fund families. Whether you're looking to work with a financial advisors or self-direct investments on your own there is a FundPortal product to help meet your retirement savings and investing needs.

**PRODUCT LISTING**

FundPortal (ETF)	<a href="#">View Product</a>
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**View Product** (callout arrow pointing to the 'View Product' link in the product listing)

- 4) From the Product Profile page you can review product information clicking on the tabs - (PRODUCT INFO | PRODUCT FEATURES | FEES & CHARGES | INVESTMENT OPTIONS)

To open a FundPortal Investment Account online click the **ENROLL** icon

**FUNDPORTAL/FUND PORTAL - ETF**

**Product Name: Fund Portal - ETF**  
**Product Type: Mutual Fund**

- PRODUCT INFO
- PRODUCT FEATURES
- FEES & CHARGES
- INVESTMENT OPTIONS

**PRODUCT DESCRIPTION**

An exchange-traded fund (ETF) is an investment fund traded on stock exchanges, much like stocks. Most ETFs track an index, such as a stock index or bond index.

Designed for account holders who self-direct thier investments or are working with a financial advisor, FundPortal ETF offers investment options from Fidelity, Vanguard, IShares and SPDRs.

**ENROLLMENT INFORMATION**

This product offers the choice of how you would like to proceed with your enrollment without a financial advisor/agent. Click **ENROLL** to begin.

**ENROLL** (callout arrow pointing to the ENROLL button)

**Want More Information?**  
 Fund Portal Account Services  
 9200 East Mineral Ave  
 Suite 225  
 Centennial, CO 80112  
 Phone: 303-625-9646  
 Email: support@fundportal.net

- 5) Select **CONTINUE** to begin the Product Enrollment.

**Product Enrollment - Step 1 Confirm Investment Advisor/Agent**

Please confirm your financial advisor/agent election.

Investment Provider/Product Name	Enrollment Status	Investment Firm Advisor/Agent
FundPortal/Fund Portal - ETF	Incomplete	Select Advisor (Optional)

**CONTINUE** (callout arrow pointing to the Continue button)

Cancel Continue

Note: If you are working with a financial advisor and wish to have them appointed to your account please contact customer service at (844) 788-3474, M - F, 9:30 am - 6:30 pm EST

6) Click **ASSIGN** to add beneficiaries

**Step 2: Product Enrollment - Assign Beneficiary(ies)**

1 2 3 4 5 6 7 8

You must assign at least one beneficiary to the account(s) listed below. Click the ASSIGN button to add beneficiary(ies) to listed investment provider/products. You may assign multiple beneficiaries if desired. Click the CONTINUE button to proceed to the next step.

Investment Provider/Product Name	Beneficiaries	Assign
FundPortal/Fund Portal - ETF	Not On File	Assign

Assign beneficiary

PLANNING TIP  
Naming Beneficiaries: What you need to Know

Cancel Previous Continue

First Name \* Paula

Last Name \* Abdul

Middle Initial

SSN (numbers only)

Address 1

Address 2

City

State

ZIP

Country

Gender [Select]

Phone

Email

Birth Date (mm/dd/yyyy) \* 01/01/1970

Relationship \* Spouse

Primary

Percent \* 100

Complete your beneficiary information in the form and click save.  
Once beneficiaries are ON FILE click continue.

**Step 2: Product Enrollment - Assign Beneficiary(ies)**

1 2 3 4 5 6 7 8

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Investment Provider/Product Name	Beneficiaries	Assign
FundPortal/Fund Portal - ETF	On File	Assign

Click CONTINUE

PLANNING TIP  
Naming Beneficiaries: What you need to Know

Cancel Previous Continue

7) Select **CONTINUE** to make your Investment Elections.

**Continue with Product Enrollment**  
Fidelity Investments/Fidelity 403(b) Account

**INSTRUCTIONS:**  
The designated investment provider/product(s) are enabled with online enrollment for establishing the account(s). Clicking the CONTINUE button will take you through the additional steps for completing the account opening.

Click CONTINUE

Cancel Previous Continue

**Step 6: Product Enrollment - Investment Allocation**

Click the "Assign" button to allocate your investments.

Investment Provider/Product Name	Investment Firm/Advisor Name	Investment Elections	Current Amount	Assign
FundPortal/Fund Portal - ETF		Not On File	0%	Assign

Click ASSIGN

Previous Continue

Comprehensive fund information including performance and expense data, along with a search feature is available for you to research investment options. Click the “ADD” icon of a fund profile you want to invest in – this will add the fund to your Investment Elections Queue.

**Available Funds & Models**

FUNDS | MODELS

Search by Name or Ticker  Select by Investment Family  Sort Display List

Click to add desired investments to your Investment Elections

Displaying 1 to 9 of 9 records (Page 1 of 1)

Investment, Performance, Fees and Expenses	Year	Since Inception	More Information
<b>Fidelity® Limited Term Bond ETF</b> Ticker: FLTB Net Expense Ratio:			Details   Prospectus   Site <input type="button" value="Add"/>
<b>Fidelity® Total Bond ETF</b> Ticker: FBND Net Expense Ratio:	Morningstar Rating: ☆☆☆☆☆ Morningstar Category: Unavailable		Details   Prospectus   Site <input type="button" value="Add"/>
<b>Fidelity® MSCI Consumer Discret ETF</b> Ticker: FDIS Net Expense Ratio:	Morningstar Rating: ☆☆☆☆☆ Morningstar Category: Unavailable		Details   Prospectus   Site <input type="button" value="Add"/>
<b>Fidelity® MSCI Health Care ETF</b> Ticker: FHLC Net Expense Ratio:	Morningstar Rating: ☆☆☆☆☆ Morningstar Category: Unavailable		Details   Prospectus   Site <input type="button" value="Add"/>
<b>VANGUARD FTSE EMERGING MARKETS</b> Ticker: VWO Net Expense Ratio: 0.14	17.60% 0.89% 2.70% Morningstar Rating: ☆☆☆☆☆ Morningstar Category: Diversified Emerging Mkts	6.35%	Details   Prospectus   Site <input type="button" value="Add"/>

8) Assign percentage allocation to your selected funds and click “CONTINUE”.

**Step 6: Product Enrollment - Investment Allocation**

Enter your investment allocations. Please use whole numbers (i.e., no decimals or fractions) and ensure that the sum of your allocations equals 100%. When you click “Continue.”

Investment Provider/Product: FundPortal/Fund Portal - ETF

Assign allocation percentages

Fund	New Elections
Fidelity® Limited Term Bond ETF	<input type="text" value="50"/>
Fidelity® Total Bond ETF	<input type="text" value="25"/>
VANGUARD FTSE EMERGING MARKETS	<input type="text" value="25"/>

Investment Provider/Product: FundPortal/Fund Portal - ETF

Confirm Allocation percentages

Fund	New Elections
Fidelity® Limited Term Bond ETF	50 %
Fidelity® Total Bond ETF	25 %
VANGUARD FTSE EMERGING MARKETS	25 %
Total: 100 %	

## 9) Review & Confirm ALL enrollment data

### Step 7: Product Enrollment - Confirmation

1 2 3 4 5 6 7 8

Click the "Confirm" button to review and confirm the information you have provided to us.

Investment Provider/Product Name	Status	Confirm
FundPortal/Fund Portal - ETF	Not On File	<a href="#">Confirm</a>

[Previous](#) [Continue](#)

Participant: Tim McGraw

**FundPortal/Fund Portal - ETF**

Allocations: FundPortal/Fund Portal - ETF

Fund	Percentage
Fidelity® Limited Term Bond ETF	50.00
Fidelity® Total Bond ETF	25.00
VANGUARD FTSE EMERGING MARKETS	25.00

[Update Allocations](#)

Beneficiaries: FundPortal/Fund Portal - ETF

Beneficiary

Name:	v, r		
Address:			
Gender:	Birth Date:	1/1/2001	
Phone Number:	Email:		
SSN:	XXX-XX-0000	Relationship:	Other
Type:	Primary	Percentage:	100.00
		Source:	SYSDEF

[Update Beneficiaries](#)

[Confirm](#)

CLICK CONFIRM

## 10) E-Sign for your account.

OVERVIEW ▾	PROFILE ▾	INVESTING ▾	SERVICES ▾	PLANNING ▾
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### Step 8: Product Enrollment - Sign Your Agreement

1 2 3 4 5 6 7 8

Click the "Sign" button to sign your agreement.

Investment Provider/Product Name	Status	Sign
FundPortal/Fund Portal - ETF	Not On File	<a href="#">Sign</a>

[Continue](#)

CLICK SIGN

Review account forms and click **"FINISH & SUBMIT ELECTRONICALLY"**.

**Step 8: Product Enrollment - Sign Your Agreement**

1 2 3 4 5 6 7 8

Investment Provider/Product: Fidelity Investments/Fidelity 403(b) Account

Review your IPX Agreement below. Click **"Finish & Submit Electronically"** to sign and submit your agreement. This is required to open your account. When the agreement has been signed, click **"Complete Enrollment"**.

I am applying an e-signature in my name to this document and have read the [Consumer Disclosure](#)

**Finish & Submit Electronically**

## Retirement Account Establishment Guide

**Complete Enrollment**

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**Congratulations, your enrollment is completed!**

A copy of the Enrollment Package will be stored in your Private Document Vault within your online account for reference.

If you have any questions please contact customer service at (844) 788-3474, M - F, 9:30 am - 6:30 pm EST