Here for you *and* your Nest Egg!
KNOX COUNTY
RETIREMENT & PENSION BOARD

ACCESSING YOUR RETIREMENT ACCOUNT

New User (First Time Log In Only)

- Log onto www.usicg.com
- Click **Retirement Account Access** (➔)
- Click Login/Register
- Click Register to access your account (under Log In)
- Follow prompts to enter requested data and security code, set up login credentials and access account

Existing User (Ongoing Account Log In)

- Log onto www.usicg.com
- Click **Retirement Account Access** (➔)
- Click Login/Register
- Enter Login ID and Password then click Log In
- Enter security code sent by system then click Continue

Features

Once you have logged on, you have access to a wide range of options found in the drop-down menus along the top of the screen.

After clicking many of the menu options, you will see available actions on the lower portion of your screen. Use your mouse to scroll over each action to view a brief description of that feature and/or click "Take Me There" to initiate that action in your account. Menu options include:

HOME

- ***Your Account*** *provides you an overview of the Current Balance, YTD Savings, YTD Return, Your Portfolio, and Investment Allocation*
- ***View All Activity*** *allows you to download your Transaction History*

MANAGE

- There is the ability to manage current investments in ***Your Portfolio*** by
  - changing the way investment positions under *Portfolio Rebalance*
  - setting your portfolio to *Auto Rebalance* specific to your asset allocation
  - make an *Investment Transfer* to sell or reinvest
- In ***Manage Contributions***, you may choose *Investment Elections*
- You can *Review My Current Loan* (if applicable), or choose *Loan Modeling* if you need to ***Withdraw*** funds from your account

VIEW

- ***Performance & Statements*** to generate a *Statement on Demand* for a selected date range, print *quarterly Statements & Disclosures*, or review the plan's *Personal Performance*
- To download *Tax Forms* choose the ***1099-R Forms***
- The quarterly ***Newsletter*** is a good reference available with current information
- ***Learning Station***
- ***Retirement Calculator***

LEARN

- ***Learn & Advice*** will provide you with market data results and *Investment Performance*
- ***Quarterly Newsletters*** link you to articles on various retirement and investment topics
- Check out the ***Market Update*** for the latest on the various market and economic information

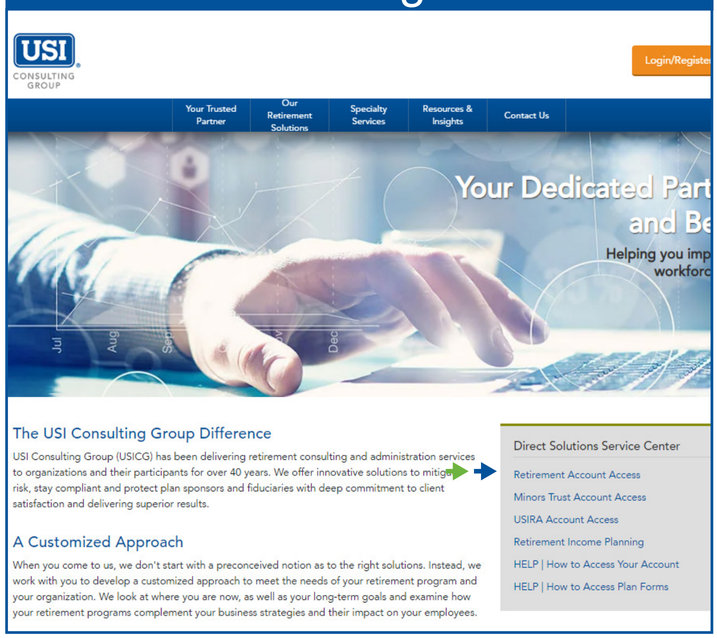
KNOX COUNTY WEB LINKS

- Visit the ***Distribution & Estimate Portal,*** refer to page 2 for instructions
- Find who to contact, forms, or retirement options at ***Knox County Retirement Website***

RESOURCE CENTER

Provides you the ability to understand ***Investing for Retirement in a Volatile Market***, the ***Investment Glossary***, ***Internal Revenue Service and Social Security Administration website links***

www.usicg.com



Voice Response System

Retirement Information at Your Fingertips

With Direct Line, you are in control of reviewing your retirement account any time you choose. You can obtain key information about your retirement account 24 hours a day, 7 days a week. Once you have entered the system, listen carefully to the main menu options. You will be asked to make a selection, and the system will automatically transfer you and voice the requested information.

Accessing Your Account

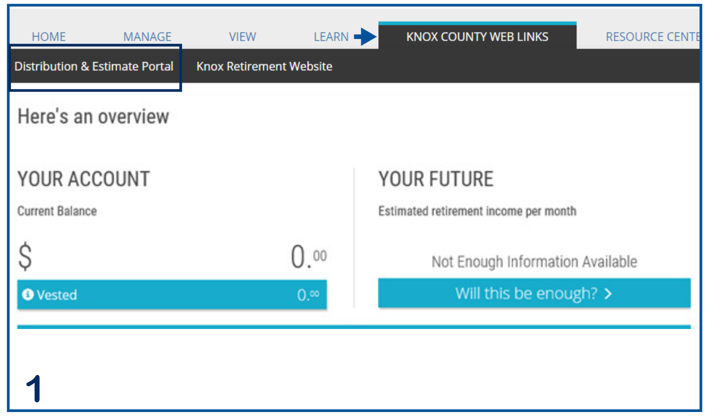
- Call 1-877-220-8997 on your touch-tone phone. You will be greeted and guided through each system function.
- To access your account, enter your Social Security Number followed by your PIN.
- Follow the system prompts to select menu options by pressing the appropriate keys on your phone.

If you have any additional questions or need your Password or PIN reset, please contact USI Consulting Group's toll-free customer service line at (866) 305-8846, plan code 524, available Monday to Friday from 8:00 am to 5:00 pm ET.

USI CONSULTING GROUP | Direct Solutions®

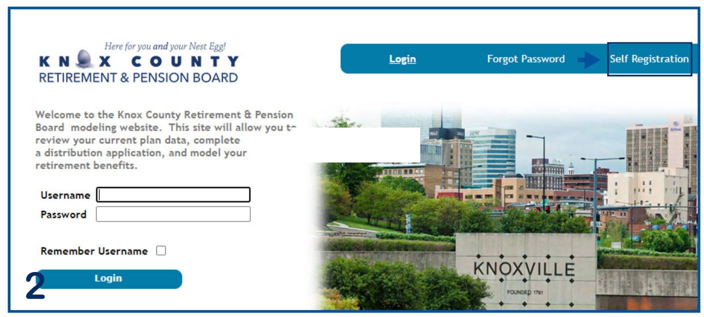
Step 1 *Follow Blue arrow* (➡)

- Click the Distribution & Estimate Portal link after selecting the "*Knox County Web Links*" tab as showed on the right.



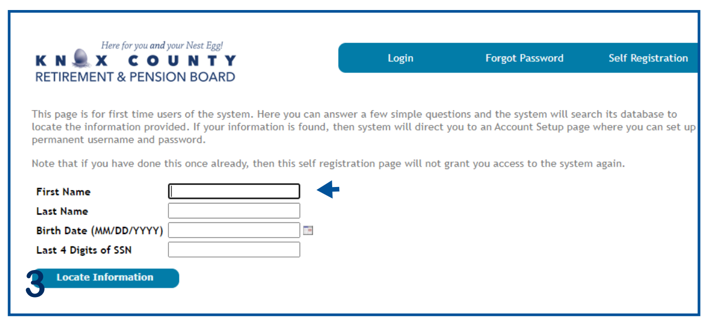
Step 2 *Follow Blue arrow* (➡)

- If you have not logged on before, you must complete Self Registration
- Click Self Registration to set up Username and password
- After clicking, a form will appear for which you will have to fill out the appropriate information.



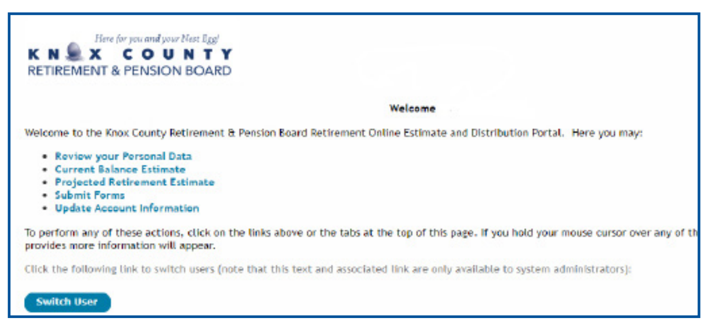
Step 3 *Follow Blue arrow* (➡)

- Fill out the appropriate information displayed in the form
- You will complete the ID and password set up here. Remember that you may make the logon details the same or different that your www.usicg.com logon.



You made it!

- A welcome screen will appear, and a number of actions will be available that include:
  - Review your Personal Data
  - Current Estimate
  - Projected Retirement Estimate
  - Submit Forms



Customer Service:
866-305-8846 plan code: 524