Quick Guide—Automatic Rollover IRA

Edition 1.0

Terms of Use

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1.1. Purpose Statement

PenChecks presents *Amplify*—A new benefit processing platform to help manage your distributions in the most effective way possible.

In order to best serve you, we have created this user guide to aid you through this new process. If you have any questions or encounter any issues, please contact our *Customer Experience team* by phone or e-mail at

Phone: +1(800)-541-3938 **Email: info@penchecks.com**

1.2. Web Browsing Requirements

Amplify works best on the following web browsers:

- Internet Explorer 11
- Chrome
- Firefox
- Microsoft Edge Safari

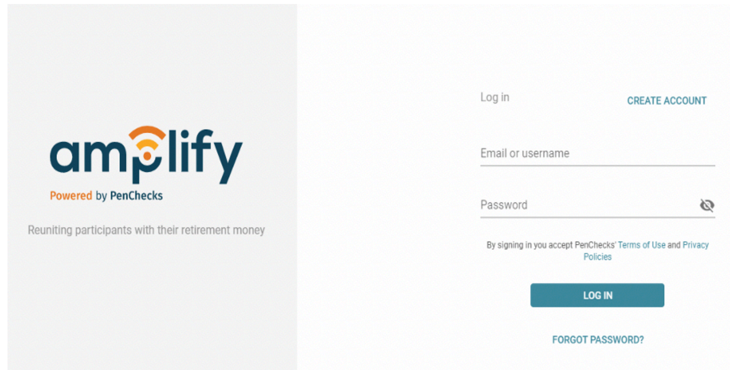
Create a new account

1. **Go to amplify.penchecks.com**

2. **Create Amplify Login and continue**

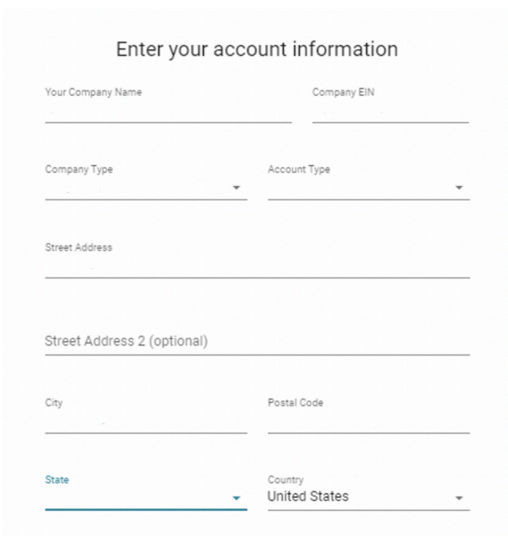
   - Amplify will prompt you to verify email your email address

   - Retrieve verification code from your email and provide code at prompt



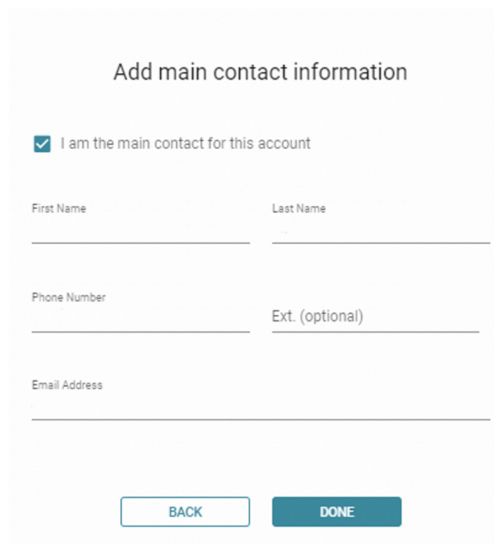
3. **Enter account information**

   Note: If you do not have company EIN on hand enter any 9 digit number and update at a later time.



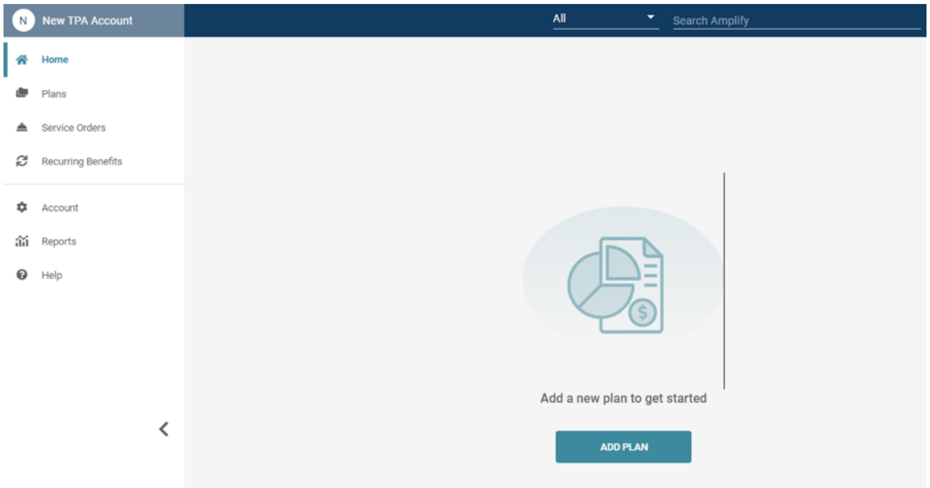
4. **Add Main Contact Information**

   Note: Main contact will act as distributions administrator



Add a plan

5. From homepage select Add Plan

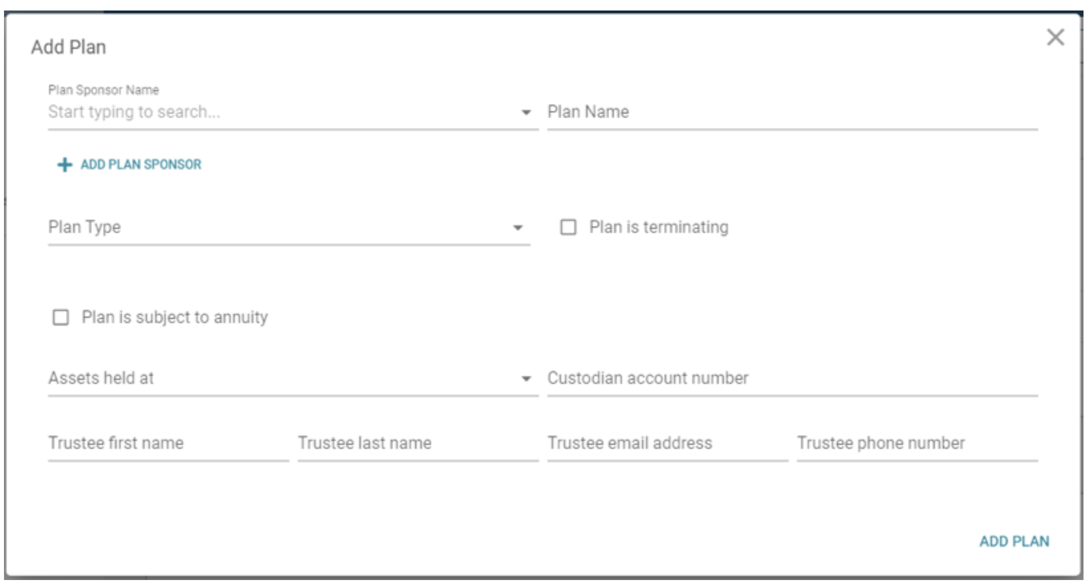


6. Enter details and Add Plan

Note: Plan sponsor name is your company name

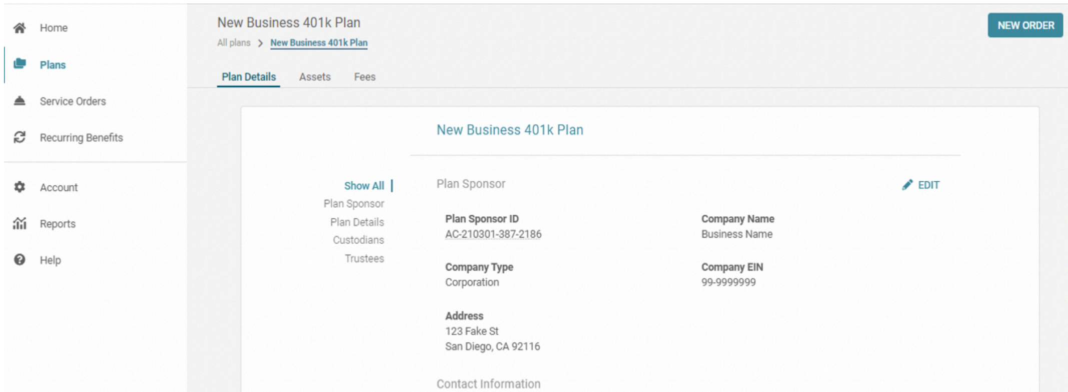
Plan name is your company and the plan type (ex: Domino's 401k Plan)

Information entered can be edited at a later time

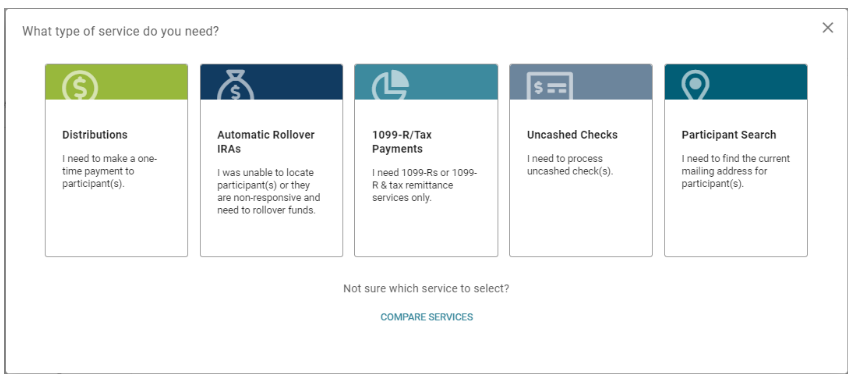


Create Service Order

7. From plan page select New Order

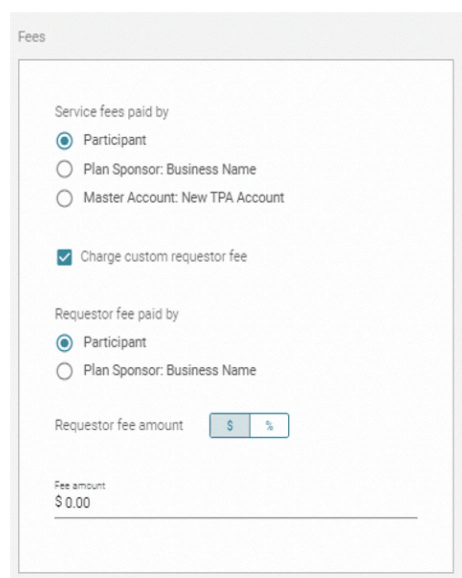


8. Choose service



9. Select who will pay for fees

Note: If you would like TPA fee to be billed to participant check "Charge Custom Requestor Fee"



10. Provide participant data

11. Submit order and print/save a copy of Review Summary page

Transfer assets to PenChecks

12. **Forward copy of review summary page to custodian or plan sponsor to initiate funds transfer**
    Note: Plan ID must be entered in memo section of check, wire, or ACH

13. **Confirmation email will be sent, upon receipt of deposit**