

# PLAN GATEWAY ALERUS INVESTMENT REPORT ACCESS



Easy, secure access to your retirement plan information is important! Log in to our sponsor website by following these easy steps:

- Go to [alerusrb.com](http://alerusrb.com) and click **Login** in the upper right corner of the screen. Enter your plan sponsor Username and Password. Click **Sign In**.
  - If this is your first time logging in, you will use a temporary Password to sign in. You will be presented with documents describing electronic consent and terms of use. Review and click the **Accept** button to continue.
  - Next, reset your temporary Password by entering your Username and clicking **Send Code**. An email will be sent to you with a verification code. Enter the six-digit verification code you receive via email, confirm your new Password and click **Submit**.
  - On the next screen, select a phone number and method (text or call) to have a code sent to verify your identity. Click **Submit**. Enter the six-digit code you receive via text or call and click **Submit**.
- Select **Plan Gateway** and click the **Plan ID** to access the Alerus Investment Report and Investment performance information.

## ALERUS INVESTMENT REPORT ACCESS

### PLAN SUMMARY

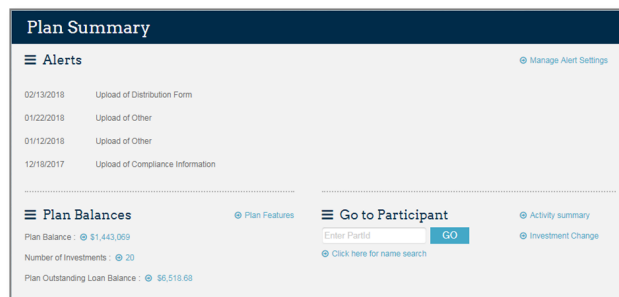
- At-a-glance summary of web usage and plan demographic information.
- View contributions by source, plan balance, and plan analytics.

### INVESTMENT PERFORMANCE

- Includes investment options in the plan and historical fund performance.
- Access to investment fact sheets and prospectus information.

### ALERUS INVESTMENT REPORT

- Access to the most recent quarterly investment report and historical reports.
- Highlights investment data and information specific to the plan.
- Includes Market and Economic Update.



To access Alerus Investment Reports, click the link to **Retrieve Files** from **Manage My Files** on the left side menu. Select **File Type** and click **Search**. Select the report from the results.

Trust and Investment services are offered through Alerus Financial, N.A., which does not provide legal or tax advice. Be sure to consider potential benefits and limitations of each option regarding the handling of your assets. Please consult with your tax or legal advisor to determine how this information may impact your own situation.

**Investment Products: (1) are not FDIC insured, (2) are not deposits or other obligations of a bank or guaranteed by a bank, and (3) involve investment risk, including possible loss of principal amount invested.**

