



Manage Your Retirement Account Online

Through the Direct Access website, www.usicg.com/touchstone, you have direct access to review and manage your personal retirement account at your convenience.

Accessing Your Account

- ▶ Log onto www.usicg.com/touchstone
- ▶ Click on the **403(b) Participants** button
- ▶ Select **Participant Login**
- ▶ Enter your **User ID** and **Password** and click the **Sign On** button

Cutoff Time for Fund Transfer Request

The cutoff time for fund transfer requests is 4:00 pm ET on a regular business day. All requests received prior to the trade cutoff will be initiated on the same business day. Any requests received after the trade cutoff, or on a day the New York Stock Exchange is closed, will be initiated the following business day.

Web 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. These options include:

My Dashboard

Click **Customize My Dashboard** on the top right of the page to select what information to display.

My Account

- ▶ **Account Balance**
View balance by Contribution type, Investment, Balance Matrix or Portfolio Mix.
- ▶ **Personal Rate of Return**
Review investment returns on your account.
- ▶ **Account History**
View Transaction History (including date, amount and type of activity in your account) and Balance History.
- ▶ **Statements**
View, download or print quarterly statements.
- ▶ **My Profile**
View personal demographic information or change your Voice Response Unit PIN.

Actions & Investments

- ▶ **Change Investments & Elections**
Change the allocation of your current balance and/or future contributions.
- ▶ **Advisory Services**
Access Morningstar® Retirement ManagerSM.
- ▶ **Research Investments**
View available investment options, rates of return and investment information.
- ▶ **Withdrawals**
View available amounts.

Loans

Perform loan modeling to calculate and request a loan, review summary of outstanding loans and view loan status.

Plan Information

View plan resources and important plan information.

Planning & Education

Access articles, tools and educational materials including an interactive retirement calculator.

Helpful Hints

Forgot Password/Account Reset

Click on **Account Reset** under the **Participant Account Services** menu on the **Retirement Plan Service Center** screen. You may immediately reset your account if you know your **User ID** and previously completed your online user registration. Alternatively, you may enter the requested information and you will receive an email regarding your account or you may follow the instructions to call the **Retirement Plan Service Center**.

Transaction Confirmation

You will receive an online confirmation of any changes, which you should print for your records.

Plan Forms and Participant Newsletters

Prior to logging onto your account, view and access plan forms and quarterly newsletters. Click the link(s) located under the **Participant Account Services** menu on the **Retirement Plan Service Center** screen.

Need Assistance?

Call the Touchstone Investments Service Center at (866) 305-8846 and enter code "241"
Monday - Friday (8 a.m.- 5 p.m. ET).