



## ACCESS YOUR WORKPLACE RETIREMENT PLAN INFORMATION

**PlanTrac®**

**BBT.com/MyRetirementPlan**

**BenefitsPhone**

**800-228-8076**

### PLANTRAC - ANY TIME. ANY PLACE. ANY DEVICE.

Access your workplace retirement plan account at **BBT.com/MyRetirementPlan**.

#### View Account

Review details about your workplace retirement plan account.

#### Make Changes

Make changes to your account, through:

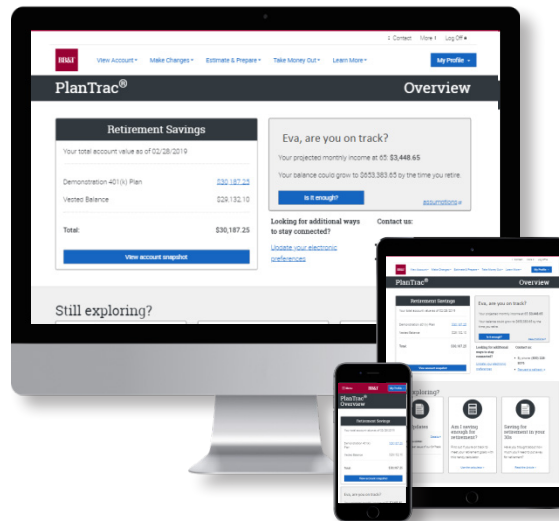
- Change Investments
- View or Change Contributions\*
- Pending Transactions
- Forms

#### Estimate and Prepare

Access the ProNvest Retirement Planner to help you determine the steps you can take to try and reach your goals.

#### First time users

Click "Enroll Now" at the login page. Your temporary PIN is the last four digits of your Social Security number followed by your birth month and day (format: MMDD). Your temporary PIN expires after 90 days.



#### Looking for additional ways to stay on track?

Go to our Overview page to view your monthly income projection, see plan updates, research market trends or access articles selected just for you.

#### Take Money Out

- Model initiate or track a loan\*
- View available withdrawals, request a withdrawal or rollover your account into an IRA\*

#### Learn More

Learn more about saving in your plan.

We offer:

- Plan Information\*
- Video Tutorials
- Calculators
- Glossary
- BB&T Financial Foundations Program

#### My Profile

Review profile information, update beneficiaries\*, manage electronic preferences or view your contribution amount\*

\*Not available in all retirement plans

## BENEFITSPHONE ACCESS

Call 800-228-8076 to stay connected to your workplace retirement plan account.

- 1 Select language – Press 1 to access your account in English, press 2 for Spanish
- 2 Enter your Social Security number
- 3 Enter your PIN

**Menu Options**

1. Account Information
2. Account Changes
3. Request a Statement or Form
4. Change your PIN
5. Investment Price Information
6. Help

### First time callers

Your initial PIN is the last four digits of your Social Security number followed by your birth month and day (format: MMDD).

**Need to speak with a representative? Call us at 800-228-8076, and press "0." Retirement specialists are available Monday through Friday from 8 a.m. to 8 p.m. ET.**

## PICK YOUR METHOD – PLANTRAC OR BENEFITSPHONE

Options	PlanTrac	BenefitsPhone
Check account balance	✓	✓
Account activity history	✓	✓
Investment performance and price information	✓	✓
Change contribution rate	✓	✓
Change future investments	✓	✓
Set up automatic fund balancing	✓	✓
Fund-to-fund transfers	✓	✓
Rebalance account	✓	✓
Request a withdrawal or rollover	✓	✓
Model, initiate or track a loan	✓	✓
Review fund fact sheets and prospectuses	✓	
Calculate your personal rate of returns	✓	
Access your eStatement	✓	
Explore calculators, videos and the BB&T Financial Wellness Program	✓	
Review the ProNvest Retirement Planner	✓	
Speak with an account representative		✓

BB&T understands the importance of privacy and security when transmitting financial data over the internet. Among the steps taken to protect our customers' financial information is data encryption with a paired-key process. Please note: your transaction is not complete until you receive a confirmation number, which you should always print for your records. A copy of your confirmation will be mailed to your address of record on file with your employer.

Traditional banking services are provided by Branch Banking and Trust Company, Member FDIC. Only deposit products are FDIC insured.

Investment solutions are provided by Branch Banking and Trust Company. Investment advisory services are provided by BB&T Institutional Investment Advisers, Inc., a wholly owned subsidiary of Branch Banking and Trust Company. Securities and Advisory products or services are: not a deposit, not FDIC insured, not guaranteed by the bank, not insured by any state or government agency and may lose value. BB&T and its representatives do not offer tax, investment or legal advice to participants. Consult your individual tax or legal professional concerning your personal situation.