ACCOUNT ACCESS

RETIREMENT

ALERUS

- Go to **alerusrb.com**, click **Log in,** select **My Alerus**, click **Go**.
  - The first time you log in, you will need to create an account. Click **Setup online access** and follow the prompts to set up and validate your account.
- Click **Log in** and enter your new credentials.
- Select your plan under Accounts and click the **Plan Summary** link on the right side of the page.

Summary

- View customized alerts regarding your plan
- Access high-level, at-a-glance summary information
  - Year-to-date account balance
  - Personal rate of return
  - Balance history
- Use calculators to help plan your retirement
- View profile information and management statement delivery in My Profile.

My Balance

- View balance by investment, source, or asset class
- Query an activity summary by investment or source
- Download your account history to import into Quicken or in a universal CSV format

My Contributions

- The Contribution Summary tab provides:
  - At-a-glance contribution history by source for each year with Alerus
  - Year-to-date contributions by source
- The Contribution Investments tab shows future contribution investments

Change My Investments

- Change how future contributions will be invested
- Change how your current account balance is invested
- Transfer specific amounts
- Establish a schedule to automatically rebalance your account
- View pending transactions

Investment Performance

- View personal rate of return for stated time frames or a specific date range
- Access fund performance, expense ratios, and prospectuses
- View the daily price of investments, or search for prices by date

My Documents

- Retrieve copies of your statements
- View the confirmation of activity you initiated in your account
- Download account tax documents

For More Information

Client Service Center

800.433.1685

info@alerus.com