

24/7 Retirement Account Access

web: <https://www.planservices.com/bbt>

phone: 866-547-8809

managing your retirement account

easy, convenient web and phone access

To help you meet your retirement goals, BB&T makes it easy for you to manage your retirement account—whether you prefer the web or our automated phone system.

The website includes a customizable dashboard view of information used most: real-time market updates, account summary and contribution elections. Our Learning Center provides educational content to help you make investment decisions and simplify managing your retirement account. You can also perform many of the same account management functions through our Interactive Voice Response (IVR) System. To help you get the most value from your retirement plan, BB&T is dedicated to delivering the tools and services you need.

web access

Access your secure account at www.planservices.com/bbt. After you login, you can customize your homepage as a dashboard to include the features you use most.

First-time users:

Click *Register Here* on the login page and follow the prompts to sign up for account access.



The screenshot displays the BB&T Retirement Account Access website dashboard. The dashboard is organized into several sections: 'Your Account Summary' on the left, 'Account Balance' in the center, and 'Questions' on the right. The 'Your Account Summary' section includes a table of account balances, a line graph showing performance over time, and a list of external rates. The 'Account Balance' section features a pie chart showing the distribution of assets and a table of contribution elections. The 'Questions' section includes a 'Growth Over Time' graph and a 'Personal Rate of Return' section. Callout boxes with red lines pointing to specific features are present:

- Perform online transactions**: Points to the 'Your Account Summary' section.
- Research your plan's investments**: Points to the 'Account Balance' section.
- Review statements or prior account activity**: Points to the 'Questions' section.
- Check the market**: Points to the 'Growth Over Time' graph.
- Explore a wealth of educational content**: Points to the 'Questions' section.
- Customize your homepage**: Points to the 'Personal Rate of Return' section.
- Monitor how your account performed over time**: Points to the 'Growth Over Time' graph.

phone access

Call the IVR system at 866-547-8809 from a touch-tone phone to stay connected to your retirement account or complete transactions. To access your account in English or Spanish:

- Enter your 4-6 character Personal Identification Number (PIN)

***First-time callers:
Follow the prompts to
establish your PIN. You
will be asked to provide
your social security
number and date of birth.***

- Select the menu option you want

menu options:

- 1 General information/set or reset PIN
- 2 Account balance
- 3 Contributions
- 4 Balance exchange
- 5 Plan loans
- 6 Distributions
- 8 Return to main menu
- 9 End your call
- 0 Speak to a Participant Services Representative

pick your method: web or IVR¹

Function	Web	IVR
Check account balance	✓	✓
Change deferral rate	✓	✓
Change contribution elections	✓	✓
Request a distribution	✓	✓
Get fund pricing and performance history	✓	✓
Get account activity history	✓	✓
Transfer money between investments ²	✓	✓
Model and/or request a loan	✓	✓ (Request loan paperwork only)
View and print your statement	✓	✓ (Request hardcopy statement only)
Obtain a fund fact sheet and prospectus	✓	
Calculate your personal rate of return	✓	
Set up automatic account rebalancing	✓	
Explore educational content	✓	
Check market information	✓	
Track account performance over time	✓	

¹Available features may vary.

²Transfer requests received by 4:00 p.m. Eastern Time will be processed at that day's price. Transfers requested after 4:00 p.m. Eastern Time will be processed the next day the stock markets are open.