There’s no time like the present to brighten the future.

CALL OR TEXT
269.218.6300

GREENLEAF TRUST®

PARTICIPANT@GREENLEAFTRUST.COM

Your Enrollment To-Do List

Schupan & Sons, Inc. Profit Sharing and 401(k) Savings Plan

ENROLL NOW AT GREENLEAFTRUST.COM

- Select **Retirement Plan Login** under Account Access
- Select +NEW USER to get started
- Enter the one-time plan password of SCH2007
- Enrollment is complete once you see: Congratulations! Your Enrollment is Complete

CUSTOMIZE YOUR USERNAME AND PASSWORD

- Username: ____
  Must contain one number (0-9), one letter (A-Z) and be 6-30 characters in length; this is case sensitive
- Password:____
  Must contain one number (0-9), one letter (A-Z) and be 12-30 characters in length; this is case sensitive

DESIGNATE YOUR BENEFICIARY

- SSN not required; date of birth and home address are recommended but not required

SET UP YOUR CONTRIBUTION AMOUNT AND TYPE

- The company will automatically start you saving at 6% pre-tax unless you instruct otherwise
- Experts recommend saving 10-20% of your income to reach your retirement goals

PICK YOUR INVESTMENT STRATEGY

- Refer to the fund menu in this booklet for Your Investment Options
- For a diversified, professionally managed strategy, select a T. Rowe Price Retirement Date Fund closest to the year you reach age 65

NEED ASSISTANCE?

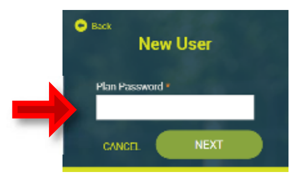
- For enrollment, reference the How-To Enroll Online instructions near the end of this booklet
- Review the online How-To tab and Show Me How videos for additional step-by-step instructions on many topics
- Contact the Greenleaf Trust Participant Help Center

How To… Enroll Online

To enroll in your Greenleaf Trust Retirement Plan account, go to www.greenleaftrust.com

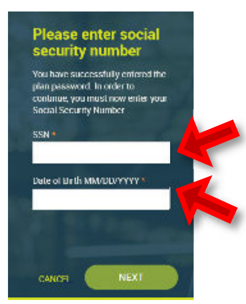
- Select ACCOUNT ACCESS from the top menu bar
- Select RETIREMENT PLAN LOGIN
- Select **+New User** from the login screen (first time login only)

- Enter the one-time **Plan Password** found on the "Enrollment To Do List" provided with your enrollment materials (contact the Greenleaf Trust Help Center if unknown)
- **Next**



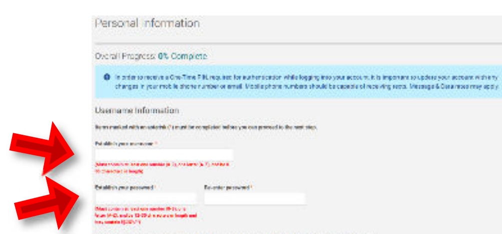
- Enter your full SSN (no dashes; just the numbers)
- Enter your date of birth MM/DD/YYYY
- **Next**

ALL STEPS MUST BE COMPLETED



STEP 1: PERSONAL INFORMATION

- Customize a Username and Password for future online and mobile app login
- **Username** is case sensitive; must be 6-30 characters in length; contain at least one number; one letter; ! @ # $ % ^ & * are the only special characters available for use
- **Password** is case sensitive; must be 12-30 characters in length; contain at least one number; one letter; ! @ # $ % ^ & * are the only special characters available for use



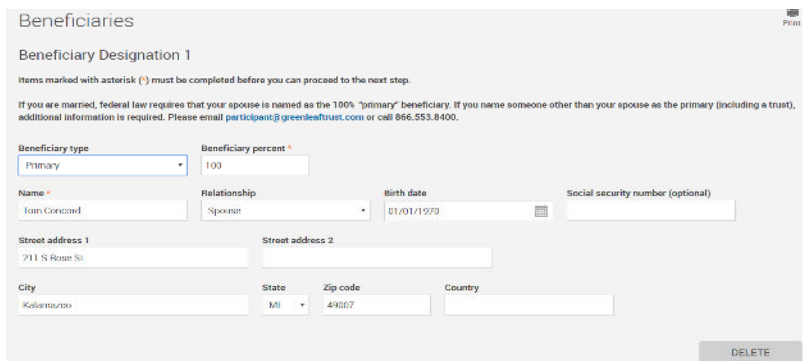
Enter your Personal Information

- Enter your Email address
- Answer one Security Question
- **Next**

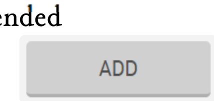
STEP 2: DESIGNATE YOUR BENEFICIARIES

You have the ability to designate as many beneficiaries as you wish

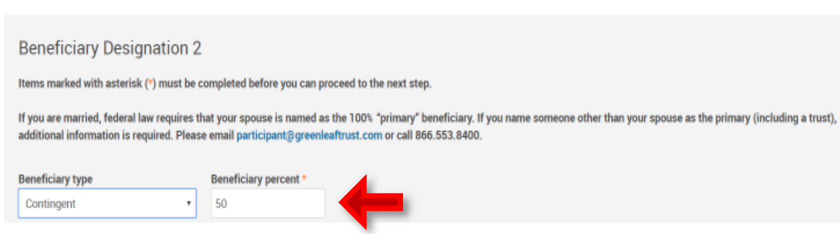
- Select the **Beneficiary Type** whether **Primary** or **Contingent** from the dropdown box
- Please note: If you are married, federal law requires that your spouse is named as the 100% primary beneficiary; to name someone other than your spouse (including a trust); you will need to complete a paper beneficiary designation which is available as a **Form** under **Statements | Notices & Forms**
- **Name** and **Beneficiary percent** are the only required fields (relationship, birth date and address are recommended)



- No contingent beneficiary is required, but recommended
- To add an additional beneficiary(ies), select **Add**



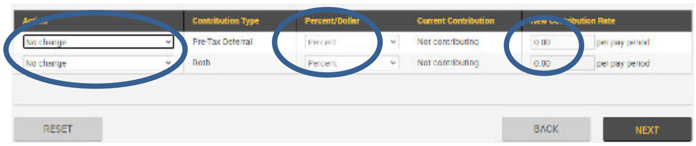
- Complete the beneficiary fields the same as you did previously
- Beneficiary percent must total 100% for single or multiple beneficiaries
- **Next**



STEP 3: CONTRIBUTIONS

Set up how much you want to save from each paycheck

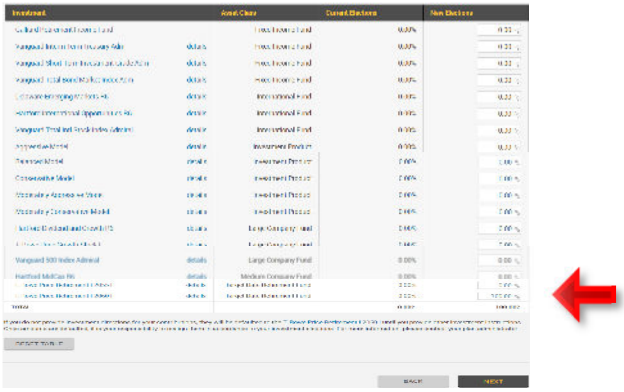
- **Change** and enter your Traditional (Pre-tax) dollar or percent from each paycheck, if any
- **Change** and enter your Roth (After-tax) dollar or percent from each paycheck, if any
- **Next**



STEP 4: SELECT INVESTMENTS

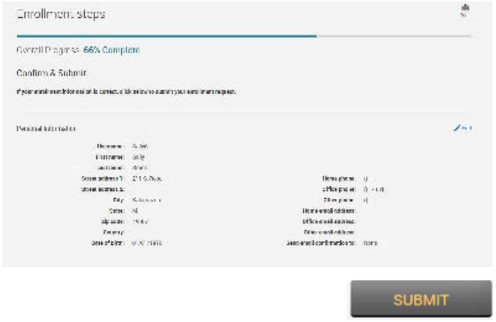
The investment elections you enter will be applied to all dollars in your account

- Enter your **New Elections**
- Your investment allocation must total 100%
- Select the T. Rowe Price Retirement Date Fund closest to the year you reach age 65 (for a diversified, age-based strategy)
- Reference the *Investor Profile Questionnaire* for assistance with your strategy
- **Next**



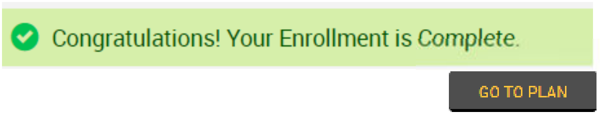
Please note: Your investment elections can be changed online at any time

- Confirm your Enrollment Information is correct; **Edit** if necessary
- **Submit**



Congratulations! Your Enrollment is Complete.

- **Go To Plan**



- Your employer will automatically be notified of your enrollment and contribution amount
- Be sure to review your paycheck to ensure your employer has enacted your contribution

- Download the Greenleaf Trust Retirement Mobile App
    - Available in iTunes and Google Play stores under "Greenleaf Trust"

Same Username and Password for online and mobile app login

GREENLEAF TRUST®

Download our Retirement Plan App

English and Spanish versions available

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Call/Text: (269) 218.6300

Email: participant@greenleaftrust.com

Live Chat: https://www.yourbenefitaccount.com/greenleaftrust/