

# Plan Sponsor Information and Assistance

To help make it easier for you, here is some information and helpful tips on accessing your **planwithease.com**® account.

## Logging in

The first time you log in to **planwithease.com** (at **www.planwithease.com**) as a plan sponsor, your Username/ID and Password will be assigned to you by **planwithease.com**. After that first login, you will be prompted to create a unique Password after setting your login security questions and answers.

***If you forget your password***, you can obtain it by going to the “log in” page and clicking “Forgot Password?”

## Making sure you can receive information from planwithease.com

Please add **customerservice@planwithease.com** to your email contacts list. This will prevent emails from **planwithease.com** from being sent to your SPAM or Junk email folder. Those communications are important... so we want you to receive them!

Please also enable pop-up windows in your web browser for the **planwithease.com** website. This will allow a new browser window to open and display requested reports and documents.

## Posting plan-specific documents on planwithease.com

**planwithease.com** can accommodate the posting of documents specific to your plan – such as Salary Reduction Agreements, Plan Documents or other information. To request that a document be posted to **planwithease.com** for your plan, please send an email with the document (preferably as a PDF) to **customerservice@planwithease.com**. Once posted to the website, the documents will be available to you and your participants under the “Forms” menu option.



For Plan Sponsor Use Only.



## Viewing Reports

Based on the services you requested, [planwithease.com](https://planwithease.com) will automatically post reports to the website on the frequency noted below. After you login, these reports can be found under "Reports" located on the left hand navigation menu on the website.

Report Name	Report Content	Frequency
Age 73 Participant Balances	Shows the account balances for each participant who has reached age 73.	February and October
Approved Hardship Withdrawal Requests	Shows all hardship withdrawal requests that have been approved.	Weekly*
Defaulted Loans	Shows all reported loan defaults.	Weekly*
Plan Totals by Investment Provider	Shows total account balances with each Investment Provider.	Weekly*
Plan Summary	A summary of the plan by Investment Provider, listing participants, account summaries, loan balances and grand totals.	Upon request
Transaction Summary by Investment Provider	Shows a summary of all transaction requests by Investment Provider.	Weekly*
Year to Date Contributions***	Shows year to date contributions to the plan.	Upon request
Contribution Limit Monitoring Summary, Projected***	Shows a list of participants in the plan who are projected to exceed the 402(g) and/or 415 limits based on contribution projections through the end of the year.	Monthly**
Contribution Limit Monitoring Summary, Exceeded***	Shows a list of participants in the plan who have exceeded the 402(g) and/or 415 limits based on contribution limits during the reporting period.	Annually
Contribution Limit Monitoring Detail, Projected***	Provides a contribution limit detail page for each employee, whether or not they are projected to exceed the annual limitations.	Upon request
Contribution Limit Monitoring Detail, Exceeded***	Provides a contribution limit detail page for each employee, showing the total contribution of each during the prior year, and whether or not that total exceeded the contribution limits.	Upon request

\* The weekly reports are run Sunday and are available for view on Monday.

\*\* The monthly reports are available by July 15 (showing data January 1 through June 30), and then monthly from September through December. The reports are run after the first of each month when provided, and are posted for view by the 15th of the month.

\*\*\* These reports are available to plans that utilize Voya's Common Remitter service.

## Have additional questions about using [planwithease.com](https://planwithease.com)?

Available once you log into the website, our [planwithease.com](https://planwithease.com) **Sponsor User Guide** should answer most questions. But if you have a question that is not covered, please contact your Voya Representative or email [customerservice@planwithease.com](mailto:customerservice@planwithease.com).

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