

BUILDING BLOCKS FOR RETIREMENT

Retirement Planning Essentials

It Just Got Easier To Save For Retirement!

Our automatic savings tool designed to help ensure successful outcomes.



Using the Automatic Savings Increase Feature

Your plan now offers an optional Automatic Savings Increase (ASI) feature designed to help you use the plan more effectively to meet your financial objectives. Pentegra's Automatic Savings Increase tool offers an easy way to increase the amount you are saving for retirement each year by setting up annual automatic contribution increases.

- Allows you to automatically increase your contribution rate each year
- Set automatic savings increments for Pre-tax and/or Roth contributions
- Contributions automatically increase until they meet the ASI maximum percentage you define at the time of your initial election
- Pentegra monitors plan contribution limits and IRS contribution limitations
- Contribution increases are automatically reported to the party responsible for payroll updates.

To use this feature, log in to your account at www.pentegra.com and go to the Deferral Rate/Amount page under Account Transactions on the top menu bar. Click here for more detailed instructions.

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