

Noble-Davis Participant Website

Because the money you are saving for retirement is important to you, we offer easy access to your retirement accounts. Using our web site, you can obtain the most current information on your account and initiate transactions.

Questions?

Please call us toll-free at 1-866-811-6604

Monday—Friday 8 AM—4:30 PM

Or email ContactUs@NobleDavis.com



This application is written to work with the latest version of Firefox, Chrome, Safari, Edge and Internet Explorer 11.0+

Logging In

Log in: Go to www.nobledavis.com and click on **Plan Logins** in the upper right hand corner.



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Plan Logins

NOBLE-DAVIS CONSULTING, INC.

helps companies to design and maintain their retirement and welfare plans. Since 1987, we've been taking responsibility for your retirement and welfare plans so you can focus on your business. We make your plan smart, simple and worry-free.

Participants:

Then click on

Participants:

Your Plan Access



[Your Plan Access Login](#) | [Guide](#)

A screenshot of a web login form. At the top right, it says "English / Español". Below that is the word "Welcome" in green. The form contains a "Username" field with an asterisk, a "Password" field with an asterisk, a "Forgot User ID or Password?" link, a "Participant" dropdown menu, and a "Remember me on this device" checkbox. A green "LOGIN" button is at the bottom. The footer contains copyright information: "Copyright © 2015 FIS and/or its subsidiaries. All Rights Reserved. | [Problems viewing the site?](#)"

The first time you log in, enter your Username (originally set to your social security number with no dashes) and your password (initially set to the last 4 digits of your social security number), and click the “Login” button to log on as a participant. You will be asked to change your log in information at this time.

Your Dashboard

Your account will open to your dashboard. This screen has menu choices at the top to give you access to a benefits summary, the ability to manage your accounts, performance numbers such as rate of return, access to loans and withdrawals as well as forms and reports.

The dashboard features a top navigation bar with links for Dashboard, Manage, Performance, Loans & Withdrawals, Forms & Reports, and Plan Selection. The main content is divided into three columns:

- Track Retirement:** Shows a projected income of \$10,997.53 per month. A bar chart compares 'Currently Projected' (110% of goal) against a \$10,000 monthly goal. A callout bubble says 'IMPROVE 110% Keep it up!'. A legend identifies 'Income Sources', 'Other Assets', and 'This Plan'.
- Account Balance:** Displays a total balance of \$280,355.19, with a vested balance of \$280,318. A donut chart shows a personal rate of return of +12.74%.
- Contribution Rate:** Shows a 10% pre-tax contribution rate with auto-increase on, and a \$0.00 Roth contribution rate.

Each section has a corresponding action button: 'MY RETIREMENT ANALYSIS', 'MANAGE INVESTMENTS', and 'CHANGE CONTRIBUTION RATE'.

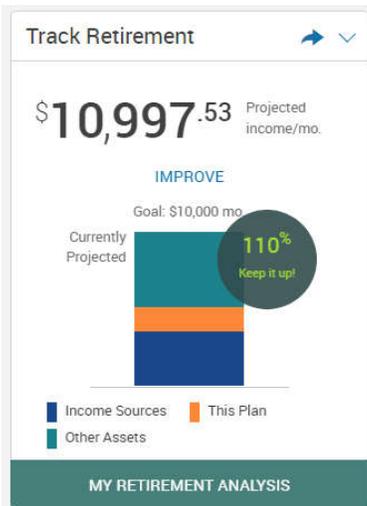
My Portfolio

View: Overview

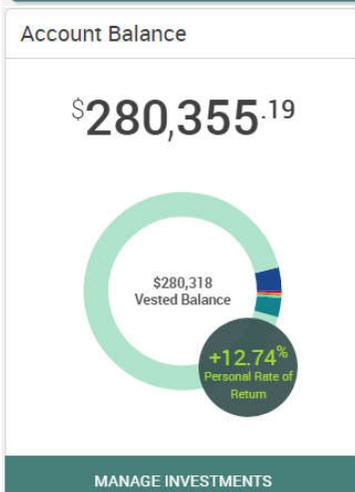
Investment Name	Fund ID	Price	From My Paycheck	Balance
> Conservative Portfolio			0%	3.87% \$10,844.89
> Moderate Portfolio			0%	91.88% \$257,621.99

Managing Your Plan Accounts

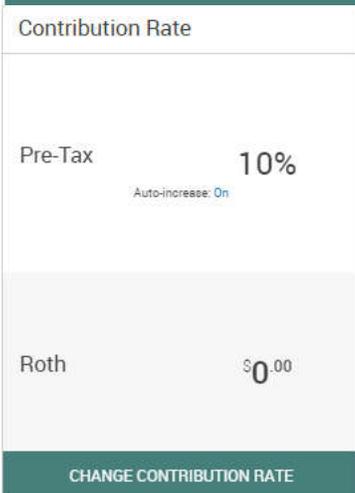
Clicking on the tiles allows you to dig deeper into a certain topic.



The **Track Retirement** tile projects what your monthly income will be in retirement. If you have multiple plans in our system, it will add all of your account balances together for all of your plans. You can define when your retirement will begin, what your retirement income should be, and what investor type you are. You can input information about your spouse, other assets that you hold, and any other retirement income you may have. The My Retirement program will analyze your information to tell you what your retirement is projected to look like and has a “What If” section that lets you make adjustments to see how they affect your retirement.



The **Account Balance** tab allows you to manage your investments. Clicking on this tab will take you to a screen where you can “Change Elections” or change the funds that your current contributions are going into. Or you can choose to “Move Money” which will transfer the money in your account between funds in the plan. In addition, you can choose “Rebalance” which makes your account balance match your current allocations or match target percentages. You can also set up the rebalance to happen automatically. Clicking on these choices will walk you through the process of making your change.



If your plan has a **Contribution Rate** tab enabled and you have entered this information online in the past, you can see your current plan contribution (the amount taken from your paycheck). Not all plans have this choice and a contribution amount will only show if you have previously entered this information online. If so, clicking on this tile will show your current deferral elections and allow you to make changes to those elections. It will also show the amount of match you are receiving and if you are maximizing the matching allocation that your company provides.

The bottom of the summary page also shows more information on your current investments as well as the recent activity in your account. There is also a retirement tip of the day!