

# Use Advisor Web to manage your plans at...



**NOBLE  
DAVIS**  
CONSULTING, INC

## *[www.noblepension.com](http://www.noblepension.com)*

Manage all of your retirement plans in one easy location! Just log on to view all of your plans in one place. Have access to participant accounts, plan totals, get forms, run reports and more!

**Log in:** After navigating to the [www.noblepension.com](http://www.noblepension.com) website, click on "Advisor Log In" under the "For Advisors" box and enter your user ID and password provided, choose "Advisor" under the "Select Role" and then click on the "Login" button to see a list of the plans available. On the list, click on the Plan Name of the plan you wish to view to get started.

The screenshot shows a web browser window displaying the 'Plan Summary' page. The browser address bar shows the URL: <https://www.noblepension.com/psfundsrcr.aspx?RANDOMNUM=08061013392297360608&LINK=9>. The page has a navigation menu with 'EE Search', 'Home', 'Account Info', 'Tools', and 'Transactions'. A 'Log Out Help' link is in the top right. The main content area is titled 'Plan Summary' and includes the following information:

- Plan: The Millionaire's Club, Inc. 401(k) Plan
- Plan year: 01/01/2008 - 12/31/2008
- Plan contact/File attachment: [Jodie Hanke <jjh@noblepension.com>](mailto:Jodie.Hanke@noblepension.com)
- Top heavy this year: This plan is not top heavy for the current plan year.
- Participating employees: 4
- Payroll is processed: Monthly
- Ending balance: \$16,255,550.97
- Pending ending balance: \$0.00

Below this information, it states 'Plan balance report last run on 06/10/2008.' and provides a link to 'View balance by account'. A 'Balance By Investment' pie chart is shown, with a 'Graph View' link below it. To the right of the pie chart is a table of investment balances:

AIM Global Health	\$3,241,375.46
Sound Shore	\$2,896,382.20
Ameristock	\$2,423,350.67
Dreyfus Technology Growth	\$2,362,524.38
Schwab Retirement Money Market	\$2,138,610.21
Oppenheimer Global	\$930,106.75
White Oak Growth Stock	\$928,633.30
Royce Low-Priced Stock	\$672,666.65
Wilshire Target - Large Compan...	\$609,486.89
Schwab Personal Choice Retirem...	\$39,059.55
Participant Loan Account	\$9,087.54

This application is written to work with Netscape 6.0+ and Internet Explorer 6.0+. While this application should work with browsers from Netscape or Internet Explorer that are within this version range, there may be versions designed specifically for AOL or Macintosh which may encounter problems with some JavaScript used in this site. Problems experienced with these browsers should be considered bugs in these browsers. You may contact your browser distributor about the problem. AOL subscribers may opt to use Internet Explorer or Netscape directly instead of going through the AOL browser. New devices such as wireless telephones, personal digital assistants, etc which are Internet accessible may not have browsers capable of properly navigating this site.

The web site at [www.noblepension.com](http://www.noblepension.com) may have the following choices:

### Employee Search:

This page can be used to search for a participant by name or social security number. Once you have found the participant you are looking for, clicking on the social security number will allow access to the individual's account through the participant web site.

### Home:

- This page allows you to view all plans that are available for you to access. For plan sponsors, this will usually be only one plan. For investment advisors, many plans may be shown.

### Account Information:

- **Plan Balance** – allows you to view your plan balances by investment and source. The information is presented in dollars and units (if applicable) and also displays vested balance. Pending trades are also displayed.
- **Summary** - displays plan summary information and displays the investment and source balances.
- **Investment Profiles** - allows you to view investment performance for the investments offered by the plan. The investments are displayed as hyperlinks and when selected will direct you to Morningstar.com, a fund ratings company.
- **Categories** - displays the total number of employees in each plan category.

### Tools:

- **Reports** - allows you to view real-time reports such as:
  - Participant Statements
  - Summary by investment and source
  - Summary by Participant
  - Executive Summary
- **Forms** - allows you to view selected forms by clicking on the form description. The forms include:
  - Investment Advisor Change of Funds
  - Investment Election Form
  - Beneficiary Designation Form
  - Rollover Election Form
- **Data Validation Center** – allows you to submit payroll and demographic information using the website. Ask your administrator if you are interested in using this feature.
- **Logo Update** - allows you to update the logo that displays on the participant web site. Contact your administrator if you would like to add your logo. The logo must be submitted in a .jpg or .gif file type.

### Transactions:

- **All Transactions** - displays the transactions in the plan, sorted by fund. You can filter the data to be viewed by investment, date range, transaction type or transaction status. You can also click on the link to view the participants involved in a specific transaction. Transaction history detail can also be downloaded.