



Connect with your retirement plan

	wellsfargo.com	Wells Fargo Mobile	Retirement Service Center
Enroll in the plan	•		•
Check your balance	•	•	•
Change your contribution amount	•	•	•
Select/change your investments	•	•	•
View your account history	•	•	•
Update/add beneficiaries	•		•
Review your rate of return	•	•	•
Review investment performance	•	•	•
Free retirement consultation			•
See if you're on track to meet your saving goals	•		•



First time accessing your account online?

Follow these steps to register from a computer, tablet, or smartphone. If you have other Wells Fargo accounts that you access online, you're already registered and don't need to follow these steps; just enter the same username and password you use to access your other accounts.

- Go to **wellsfargo.com**. From a computer or tablet select **Enroll** at the top of the page; from a smartphone go to the main menu in the upper right corner and select **Enroll in Wells Fargo Online**.
- Enter the requested information.
 - If you don't have another Wells Fargo account, check the box noting you don't have an account number.
 - If you do have another Wells Fargo account, such as a checking account, mortgage, or credit card, enter the account number.
- Answer a question to confirm your identity.
- Enter your email address and create your username and password.
- Check your email to complete your online registration.
 - Look for an email from Wells Fargo with the subject line "Complete your Wells Fargo Online® enrollment."
 - Select the **Complete My Enrollment** link found at the bottom of the email.
 - The link will open a new webpage; sign on to your account using the username and password you just created.
- Review and accept the online terms and conditions; after accepting, you'll be directed to the **Account Summary** page.
- Select your plan name to access your retirement plan Dashboard. From a computer you can customize your Dashboard experience and sign up for electronic delivery preferences.

Have a plan for the future

When it comes to saving, have a plan — check out the online Dashboard

One rule of thumb is to save enough to replace 80% of your pre-retirement income for each year you may spend in retirement. Viewable after you sign on to your account, the Dashboard provides an easy way to see if you're on track to meet this 80% replacement goal. You can even add retirement savings you might have outside your retirement plan to give you a more complete view.

Tools to help you take the next step

- Interactive calculators: wellsfargo.com/planningtools
- Retirement Quick View calculator: wellsfargo.com/quickview
- Risk Tolerance Quiz: wellsfargo.com/riskquiz
- Blogs and social media: blogs.wellsfargo.com



Connect with your plan anywhere using your smartphone

Update and review your retirement plan account, including your contribution amount and investments from your phone. Download the Wells Fargo Mobile app or visit wellsfargo.com from your phone's Internet browser to get started. Use the same username and password you use to access your account on a computer.

First time app users: To provide additional security, the first time you use the app you will be prompted to provide an Advance Access Code. Follow the directions to receive the code. If you don't have a phone number on file or don't have other accounts with Wells Fargo you may be asked to call an 800 number and speak to a call center representative to receive the code.

Check your account balance by text message

Text us, and we'll reply with your retirement plan account balance. To learn more and sign up for this functionality, access your account at wellsfargo.com from a computer and select the **Account Services** tab. From the Mobile Banking section, select **Set Up/Modify Mobile Banking**.



Call us

1-800-SAVE-123 (1-800-728-3123)

The Retirement Service Center offers 24-hour automated account access. Representatives are also available Monday through Friday from 7:00 a.m. to 11:00 p.m. Eastern Time.

Retirement consultation

Our trained retirement specialists will conduct a brief, one-on-one phone consultation, to understand your vision for retirement and help you estimate what you should consider saving.



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