ACCOUNT ACCESS TIPS

Log in to Account Access for your ICMA-RC account at www.icmarc.org/LACMTA

Here are a few tips to keep in mind when you register to access and manage your 457 & 401(k) Retirement Plans.

How to create a new user ID and password:

1. **Click "Set Up Your Online Access" in the account log-in box in the upper-right corner of the screen.** Follow the prompts to enter your information — this sets up online access to your account.

2. **User ID:** Your user ID must be 6-32 characters in length and is not case-sensitive.

   It must meet the following two options:

   - At least one number (e.g., 1, 2, 6) **or** special character from the following five characters: @, _, -, *, **or** .
   - At least one alphabetical character (e.g., b, c, z or B, C, Z)

3. **Password:** Your password must be 8-24 characters in length and is case-sensitive.

   It must meet three of the following four options:

   - At least one number (e.g., 1, 2, 6)
   - One special character from the following five characters: @, _, -, *, **or** .
   - At least one lowercase alphabetical character (e.g., b, c, z)
   - At least one uppercase alphabetical character (e.g., B, C, Z)

Other important reminders:

- To reset your password, select the "Forgot User ID or Password?" link in the log-in box. Once you provide some of your personal information to verify your identity, you can create your new password immediately.
- Make sure that cookies are enabled — you can find this information under the Internet Options setting in your browser.
- For more information, you can contact one of your local ICMA-RC Retirement Plans Specialists who can help. Go to **www.icmarc.org/LACMTA** to schedule an individual appointment.

ICMA RETIREMENT CORPORATION | 777 NORTH CAPITOL STREET, NE | WASHINGTON, DC 20002-4240
TEL: 202-962-4600 | FAX: 202-962-4601 | TOLL FREE: 800-669-7400 | WWW.ICMARC.ORG/LACMTA

ICMA-RC BUILDING PUBLIC SECTOR RETIREMENT SECURITY

Los Angeles County Metropolitan Transportation Authority

Retire 457 & 401

AC: 43009-0619

ACCOUNT ACCESS TIPS

Log in to Account Access for your ICMA-RC account at www.icmarc.org/LACMTA

The questions and answers below were compiled to address frequently asked questions with regard to Account Access.

1. How can I access a copy of my statements?

- From the **Access My Accounts** tab, select your desired plan.
- Once under the correct plan, click **Statements & Confirms** on the left-hand side of the page.

2. How do I move from the fund I am currently in to a different fund?

- From the **Access My Accounts** tab, select your desired plan.
- Once under the correct plan, click on the **Manage Funds** option at the top of the page.

3. Where can I find information on account performance?

- Performance activity for specific plans can be found on the selected plan's page.
- For performance activity across all plans, click the **Activity Across Plans** option from the **Overview** dropdown menu.

4. How can I see my current contribution* amount?

- From the **Access My Accounts** tab, select your desired plan.
- Once under the correct plan, click on the **Contributions** option at the top of the page.

**For those contributing a percentage, you will see an actual dollar amount reflected.*

5. How do I calculate my retirement benefits?

- To view your **Income Projection**, click on the **Income Projection** option from the **Overview** dropdown menu.
- To customize your projection, you can use one of the custom calculators under the **Learning & Tools** option.

6. How do I know which account I am looking at?

- When accessing one of your accounts, the plan name and plan number are located at the left side of every page.

7. How do I enroll in Fund Advice* or Managed Accounts?

- From the **Access My Accounts** tab, select your desired plan.
- On the plan page, select the **Investments** option, then the **Guided Pathways**® option; this will pull up the **Guided Pathways** page.

**Fund Advice is a free service for the LACMTA Retirement Plans participants.*

8. How do I enroll in a TD Ameritrade Account*

- From the **Access My Accounts** tab, select your desired plan.
- On the plan page, select the **Investments** option, then the **Brokerage** option.

**The minimum requirements may differ for some plans. Please check with your employer or ICMA-RC. You can also speak with your local ICMA-RC Retirement Plans Specialist for more information.*

9. If I qualify for Premier Services, how do I enroll?* *(A balance of $50,000 is required.)*

- From the **Access My Accounts** tab, select your desired plan.
- Once under a plan, click on the **Premier Services** option on the left-hand side of the page.
- Once enrolled in Premier Services, you will be able to access the content on this page.

**If not enrolled, please answer the questions to complete your enrollment.*

10. How do I change my user ID, password, or security questions?

- Click on the **My Profile** option located in the top right of any page.
- From this page, you have the option to change your user ID, password, or security questions.

11. Where can I find a list of the investments that are available for my account and their fund performance?

- From the **Access My Accounts** tab, select your desired plan. On the plan page, select the Investments link on the left.
- Click on **Fund Profiles** to see a list of available investments.
- Click on **Fund Performance** to see the performance of those funds.