

# Invest - Link System

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## **INVEST-Link Account Access System Features :**

### ➤ **Account Inquiry**

- Current Plan Balance By Fund
- Balance Details (Source and/or Model)
- Statements on Demand
- Historical Fund Performance
- Fund Prices (NAV)
- Transaction History
- Pending Transactions
- Fund Investment Objective
- Documents (SPD & Forms)
- Hardship Withdrawal Amount (Option)
- Personalized Rate of Return (Option)

### ➤ **Account Management**

- Transfer Existing Savings by Percent
- Fund Re-Allocation
- Re-Balance Model (Scheduled)
- Future Investment Directions
- Savings Rate Change (Option)
- Loan Balances (Option)
- Loan Modeling (Option)
- Withdrawals (Option)
- Beneficiary Information (Option)
- Password Change/Reminder
- Participant User Profile (Address & E-mail)

### ➤ **Retirement Planning**

- Plan Information
- Financial Services
- Literature Requests
- Education Guidance & Planning (Option)
- Financial Calculators
- Fund Information
- Contact Us

## ***Private, Secure & Confidential :***

The INVEST-Link systems prevent unauthorized access to your account by requiring that you enter a **USER ID** and a **PASSWORD**. Your Social Security Number will be set as your **USER ID** (cannot be altered). Initially, your **PASSWORD** will be set as the last four (4) digits of your Social Security Number.

You can access the INVEST-Net system, via the participant login link at **WWW.FBANET.COM**. Once you log onto the system, you may change your password or create password reminders. New passwords must be 8-16 characters long and there are no restrictions on the alpha or numeric character makeup of the password. To maximize account security and confidentiality, your data transmission is protected with Thawte 128-bit SSL encryption. The INVEST-Net system requires Acrobat Reader and Microsoft Internet Explorer to view properly. The participant login page has links to download both applications for free.

You will need a touch-tone telephone to access the INVEST-Tel system @ **(877) 201-0847**. Once you enter the system, you may change your password. New passwords must be exactly four (4) characters long and are restricted to only numeric characters.

It is important to be involved in your retirement savings account, informed about your progress towards your savings goal, and in touch with your investment options.

If you are experiencing any problems using either system, please e-mail **FBA@FBANET.COM** or call our Information Line @ **(504) 849-1003 - FBA,Ltd.**

*INVEST-Net and INVEST-Tel make it simple!*

