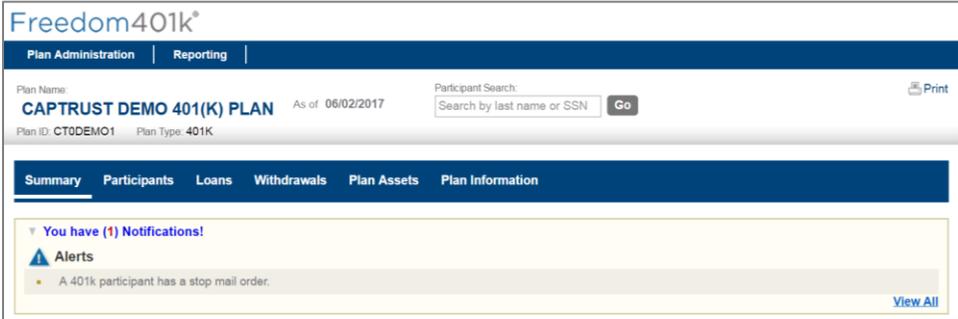


Custom Reporting

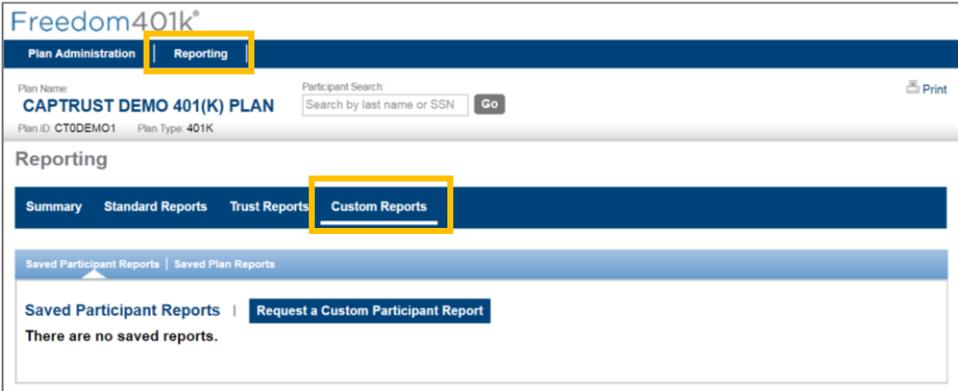
A 401k Participant Has A Stop Mail Order

You may see a notification when you log into your plan sponsor account that states “A 401k participant has a stop mail order”. This occurs when at least one participant in your plan has a stop mail order on their account because mail was returned from their address of record.



Please use the follow steps to update the participant and remove the notification.

1. Select the “Reporting” option from the top ribbon on the Summary section and select “Custom Reports” from the menu options.



Custom Reporting

2. Select the "Request a Custom Participant Report" button; in the new window that has opened, click the purple arrow next to "Census" to expand this section.

Request a Custom Participant Report

- Census
- Financial
- Loans
- Transaction History

Cancel Run Report

3. Check the box next to Participant Address, under the Display column and the boxes next to Stop Mail, under the Query and Display columns. Then click the Run Report button.

Request a Custom Participant Report

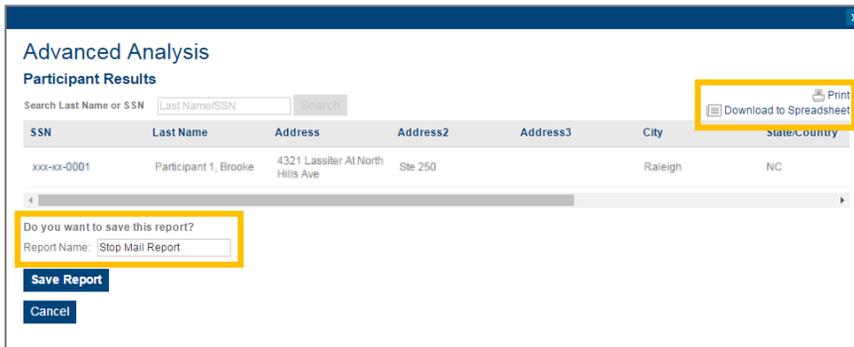
Query	Display	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Name/SSN
<input type="checkbox"/>	<input type="checkbox"/>	Status
<input type="checkbox"/>	<input type="checkbox"/>	Affiliate
<input type="checkbox"/>	<input type="checkbox"/>	Plan Entry Date
<input type="checkbox"/>	<input type="checkbox"/>	Birth Date
<input type="checkbox"/>	<input type="checkbox"/>	Employment Periods
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Participants Address
<input type="checkbox"/>	<input type="checkbox"/>	First Contribution Date
<input type="checkbox"/>	<input type="checkbox"/>	Years of Service
<input type="checkbox"/>	<input type="checkbox"/>	Vested Percentage
<input type="checkbox"/>	<input type="checkbox"/>	Eligibility Date
<input type="checkbox"/>	<input type="checkbox"/>	Pre-Tax Contribution %
<input type="checkbox"/>	<input type="checkbox"/>	Pre-Tax Contribution Dollar Amount
<input type="checkbox"/>	<input type="checkbox"/>	Post-Tax Contribution %
<input type="checkbox"/>	<input type="checkbox"/>	Post-Tax Contribution Dollar Amount
<input type="checkbox"/>	<input type="checkbox"/>	Roth Contribution %
<input type="checkbox"/>	<input type="checkbox"/>	Roth Contribution Dollar Amount
<input type="checkbox"/>	<input type="checkbox"/>	Authorization
<input type="checkbox"/>	<input type="checkbox"/>	Authorization Method
<input type="checkbox"/>	<input type="checkbox"/>	Authorization Date
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Stop Mail <input type="radio"/> Yes <input type="radio"/> No
<input type="checkbox"/>	<input type="checkbox"/>	Category Assignment

Cancel Run Report

Custom Reporting

- The system will generate a report with all of the affected participants. Click “Print” or “Download to Spreadsheet” to save a copy of the list. Verify the addresses. You may need to contact the affected participants if you do not have an updated address on file.

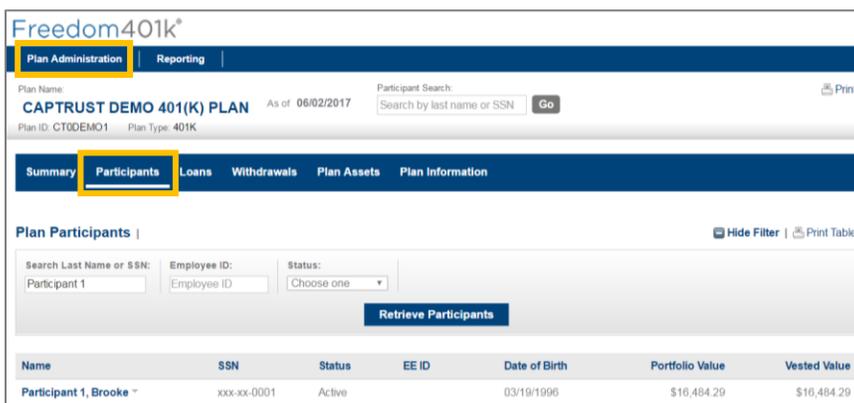
You may also save this report for use again in the future by entering a Report Name and clicking the “Save Report” button.



The saved report will now appear under Custom Reports in Saved Participant Reports.



- To update the participant’s address, go to Plan Administration and click on the Participants section. Enter the participant’s last name and click Retrieve Participants.



- Click on the dropdown arrow next to the participant’s name and select Participant Information.



Custom Reporting

7. In the Personal & Employee section, update the participant's address with the corrected mailing information and uncheck the box "Account has returned mail." Then click Save.

Update Brooke Participant 1 CAPTRUST DEMO 401(K) PLAN

Personal Information

Social Security Number:
:xxx-xx-0001

First Name:* Brooke Middle Name: Participant 1 Last Name:* Participant 1

Birth Date:* 03/19/1996 Gender: Female Marital Status:

Mailing Address:*
4321 LASSITER AT NORTH HILLS AVE
STE 250

Country: UNITED STATES City:* RALEIGH State: NC ZIP/Postal Code:* 27609 | 5782

Account has returned mail.

[Add an Alternate Address](#)

Email: PARTICIPANT1@GMAIL Phone: ###-###-#### Mobile Phone: ###-###-####

Domestic Foreign

Once you have made the updates to all of the affected participants the notification will no longer appear.

8. It is also essential to update the affected participants' addresses in your payroll system; if you neglect to complete this step all of the changes you made to the participant's accounts will be reset.

If you have any questions or would like any assistance, please do not hesitate to contact your Relationship Manager at 248.620.8100.