Employees' Pension and Investment Plan of Diocese of Lexington and Other Adopting Employers

Web Portal User Guide

Table of Contents

Have questions? Ask…

nyhart

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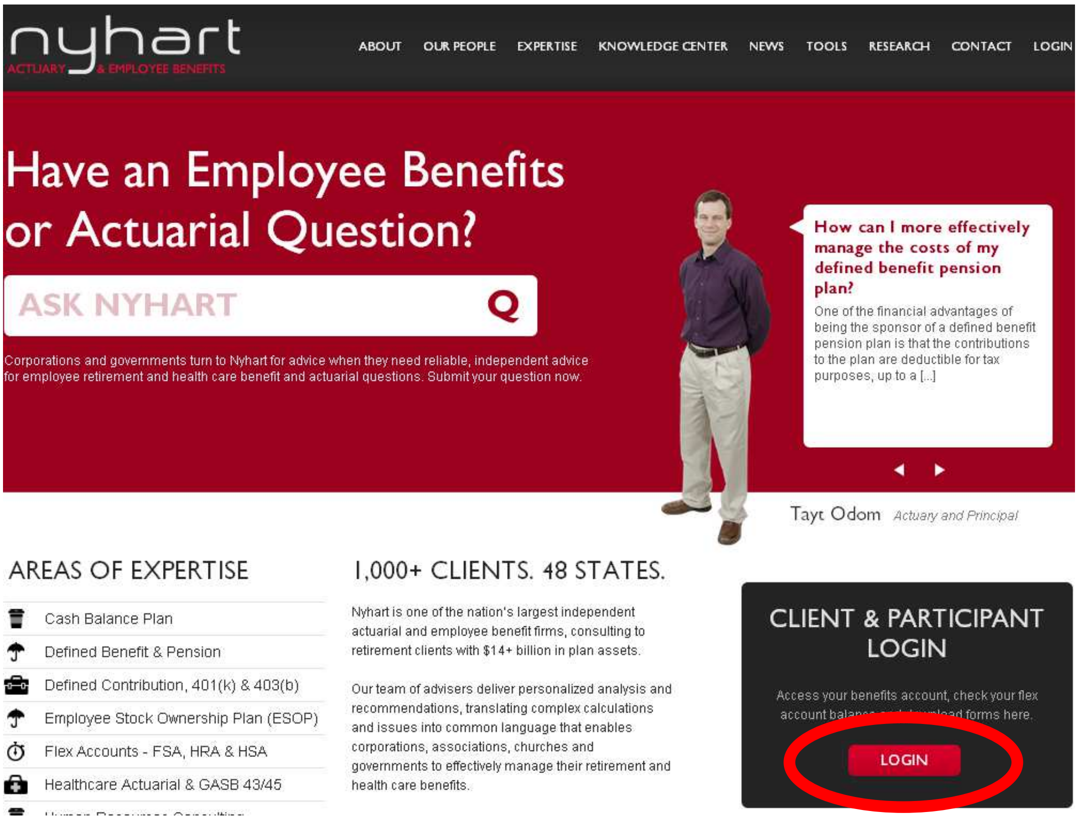
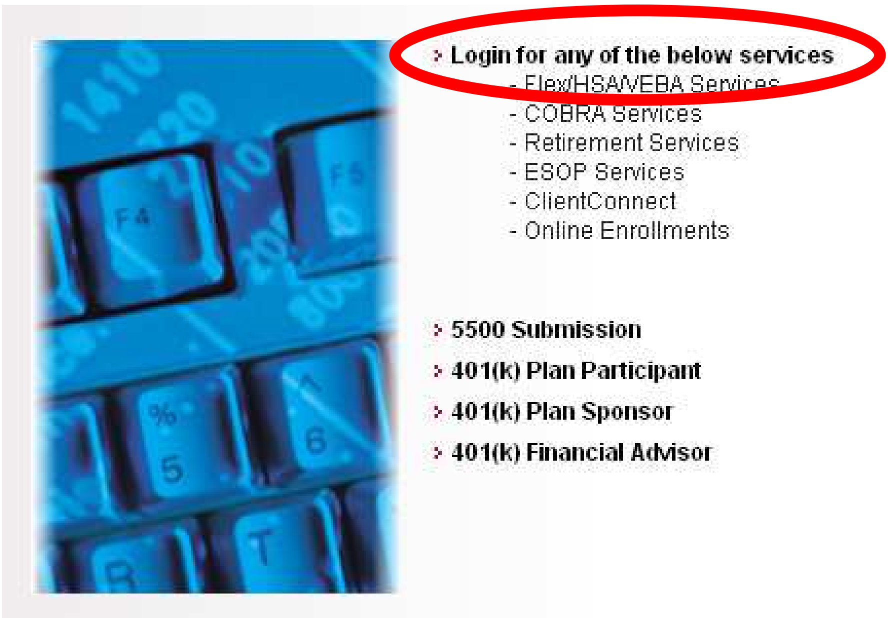
Website Login

1. Begin by going to http://www.nyhart.com and click the "Login" button in the lower right portion of the screen.



2. On the following screen, select "Login for any of the below services".

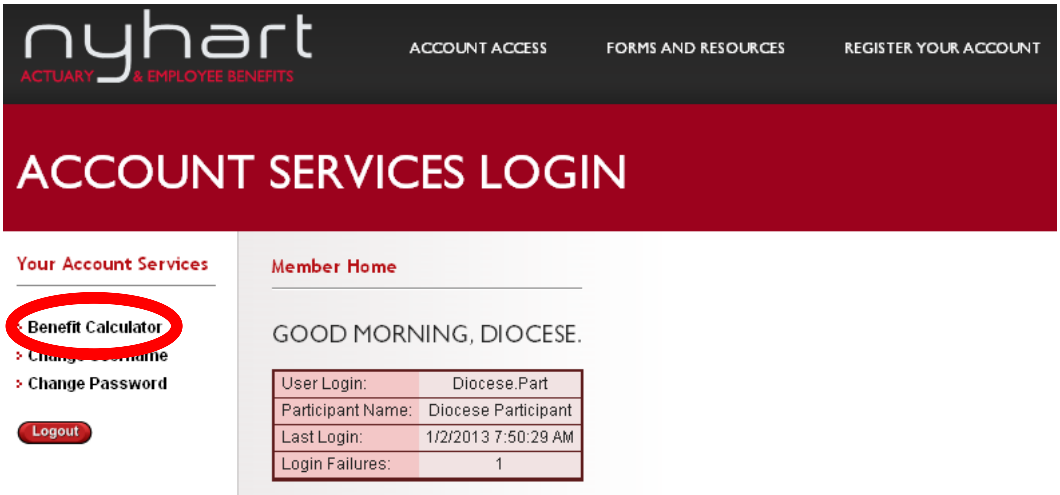


Website Login

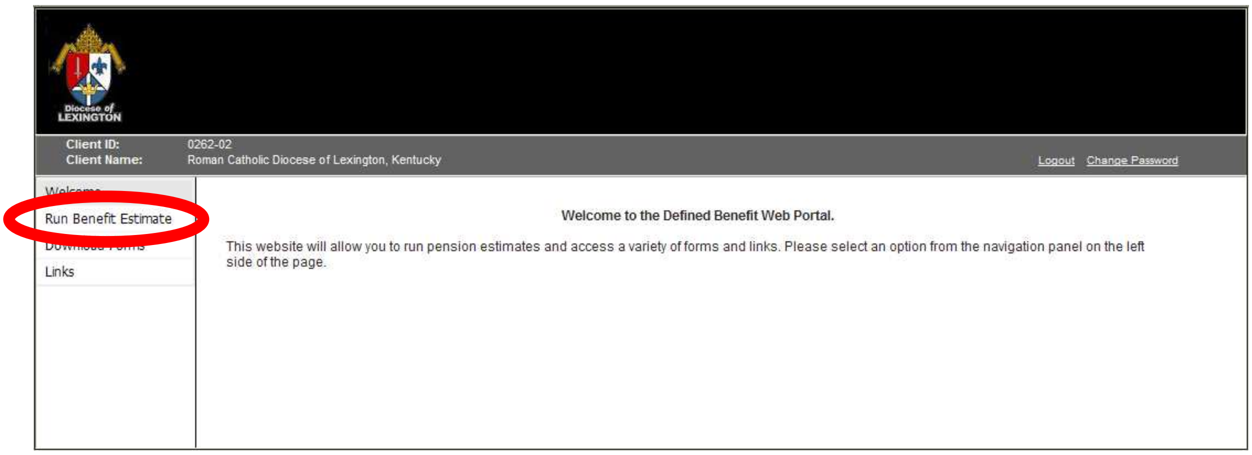
3. Enter your User Name and Password on the right side of the screen. The login information is the same as used to view your annual statement. If it hasn't been changed previously, your login information will be as shown below.

    - Initial Username: SSN (without dashes)
    - Initial Password: Date of Birth (MMDDYYYY)

4. Select "Benefit Calculator" on the left side of the screen.



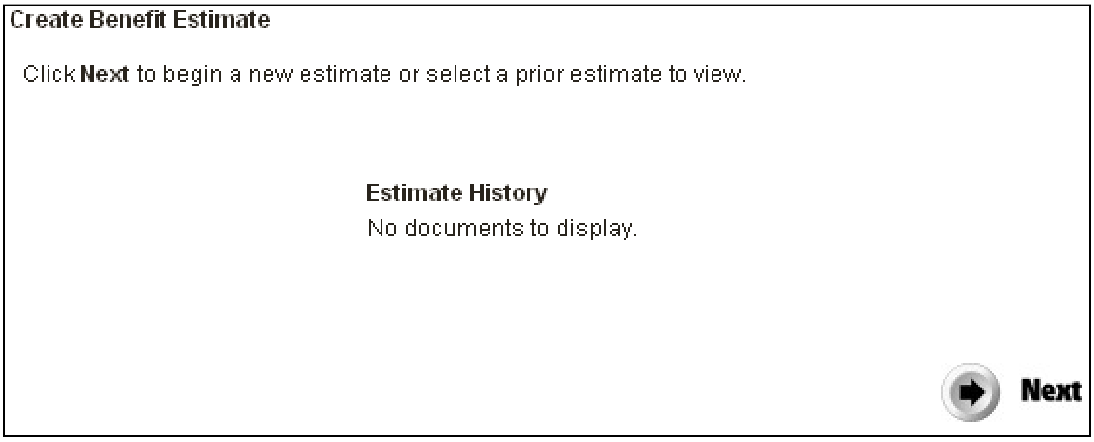
5. You will now see the Welcome page of your calculator.



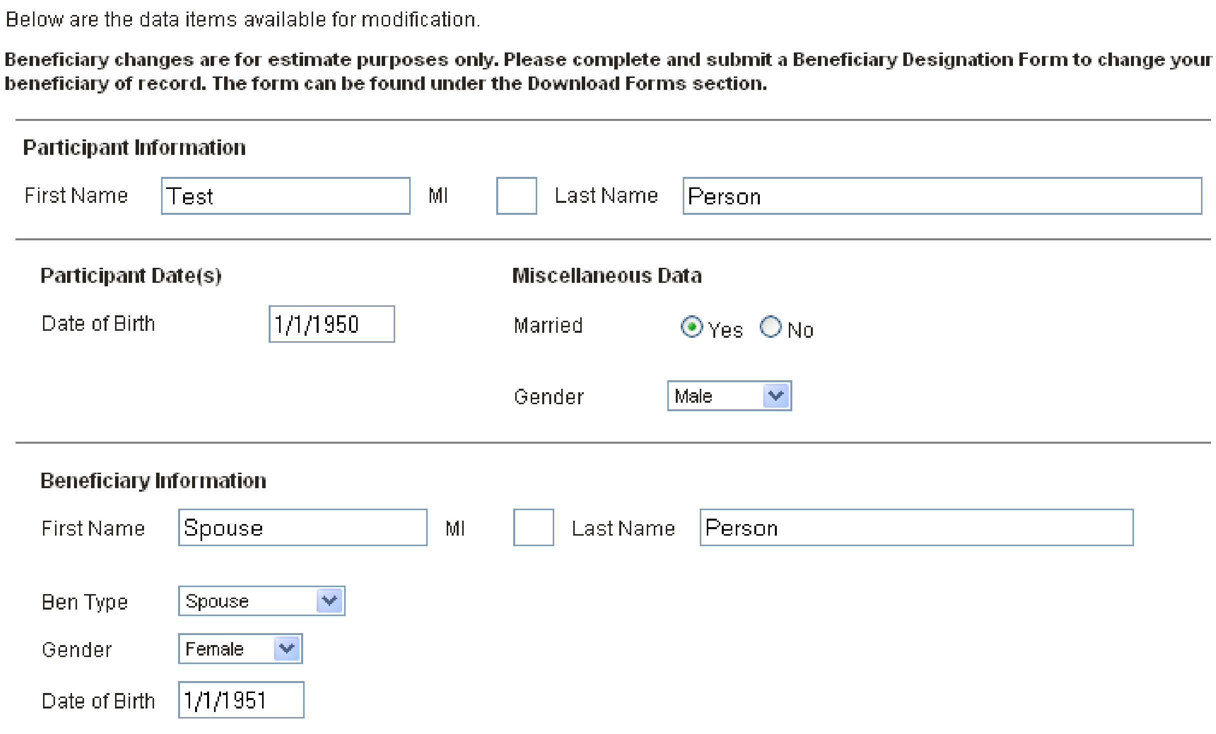
Run Benefit Estimate

1. From the Welcome page, select “Run Benefit Estimate” on the left side of the screen.

2. The screen below will appear. Click “Next”.



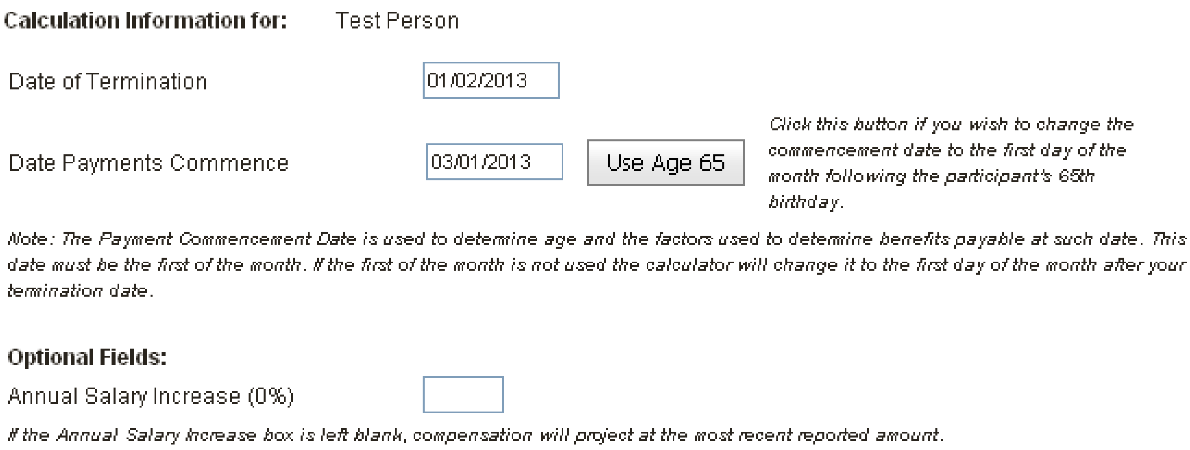
3. The following page will allow you to view your personal demographic information. You will only be allowed to make changes to the marital status and beneficiary’s date of birth. Any other changes made will not be saved. After reviewing the data, select “Next”.



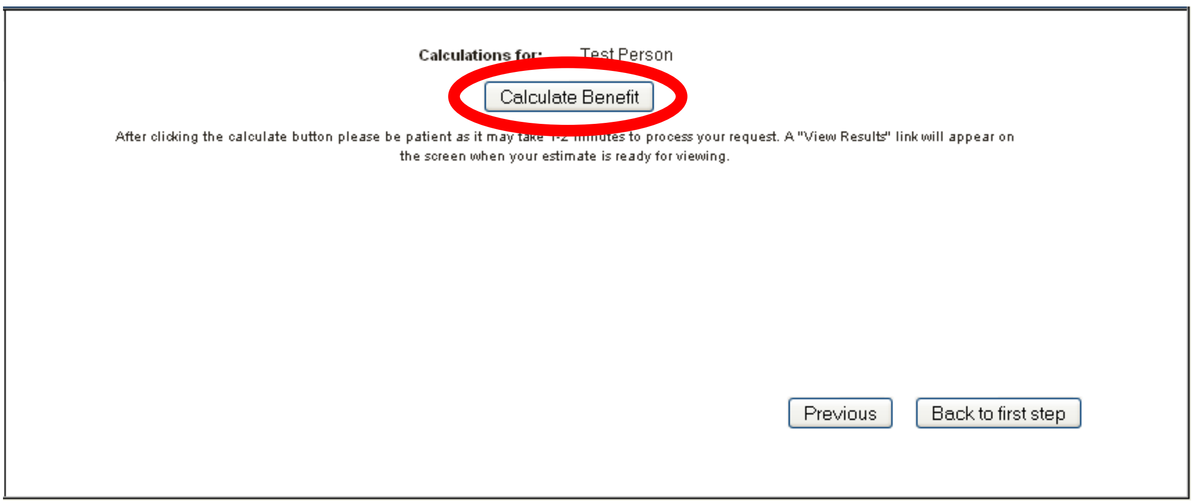
Run Benefit Estimate

4. You will now see a page of your employment history. No fields on this page can be edited. Please review the data and contact Noreen Brown with any concerns. Select “Next”.

5. After the personal information and history pages, you will see the Calculation Information page shown below. Input the appropriate dates and amounts.



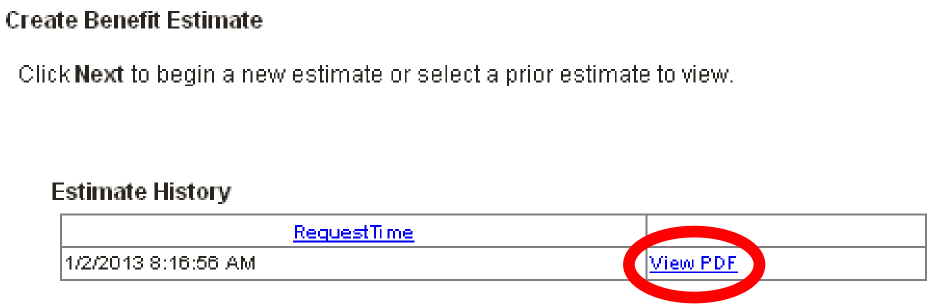
6. After clicking “Next”, you will see the final calculation page. To create the estimate, select the “Calculate Benefit” button.



Run Benefit Estimate

7. You should see the website loading on your screen while the benefit is being calculated (may take a few minutes), and if there were no errors in processing the benefit you will see the “View Results” button displayed. Click “View Results” to view the PDF of the benefit.

8. The benefit can also be retrieved from the “Estimate History” table displayed when you return to the initial “Run Benefit Estimate” page.



Beneficiary Designation

- Be sure to have a current Beneficiary Designation Form for this plan on file with Nyhart.

- Beneficiary Designation Forms can be found under the "Download Forms" section of the website as well as the end of this document.

- Please return completed forms to Noreen Brown at Nyhart and retain a copy for your records.

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Benefit Eligibility

You are immediately eligible for benefits under this plan upon any of the following:

- Cease participation or termination of employment (voluntary or in-voluntary) with less than 10 years of service

- Retirement, termination of employment (voluntary or in-voluntary), and meeting one of the following:
    - Age 65 with 5 years of plan participation
    - Age 55 with 10 years of service

- In-Service Distribution, no longer making contributions, currently employed with the Diocese, and attaining one of the following:
    - Age 65 with 5 years of plan participation
    - Age 65 with 10 years of service
    - Age 60 with 30 years of service and 5 years of participation

- Death

Contact Noreen Brown at Nyhart with any questions regarding your retirement benefit from this plan or to apply for your benefit.

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