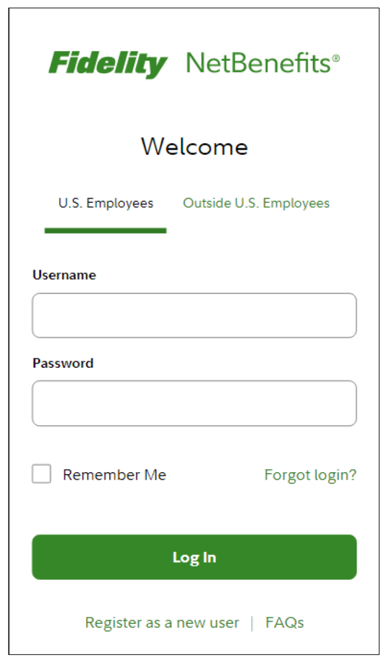
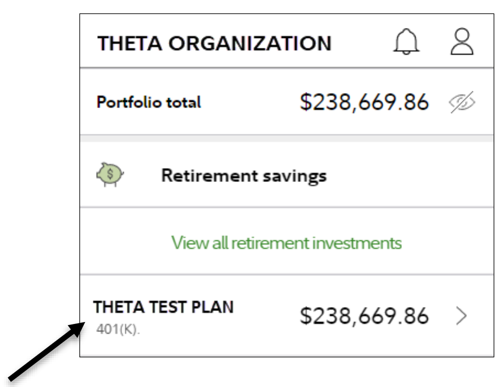
NetBenefits® Mobile App

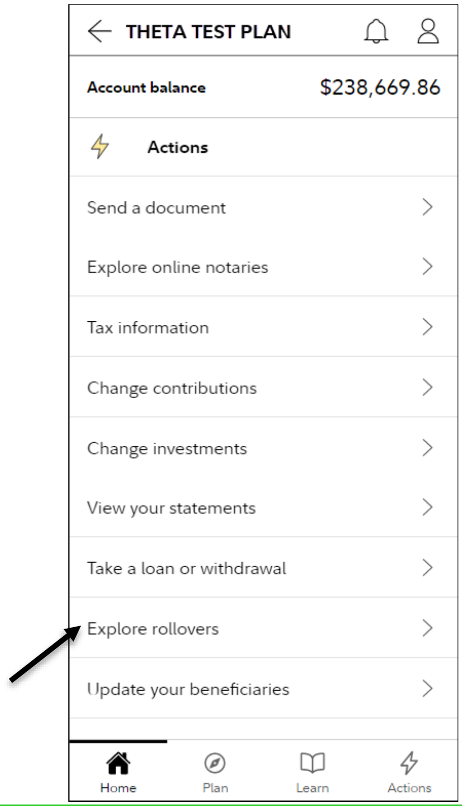
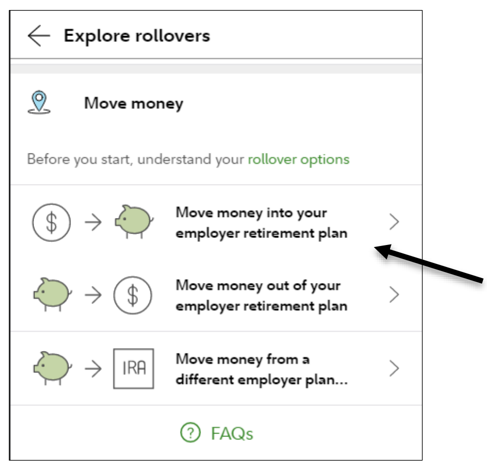
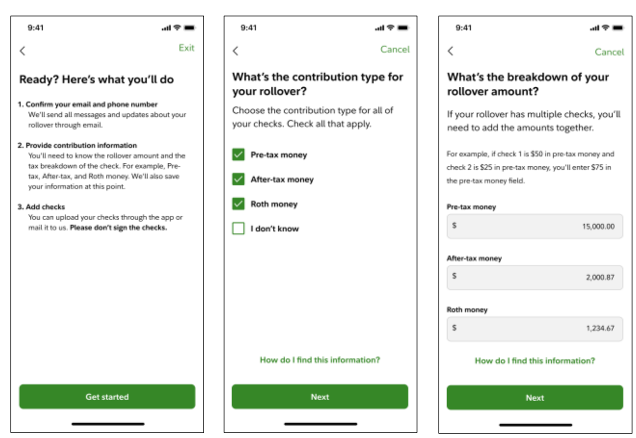
Deposit a Rollover check

You can easily deposit a rollover check from a former workplace savings plan, to your current plan, using the NetBenefits® Mobile App. There are two phases to this process: *Entering Your Rollover Details* and *Capturing Your Check*.

Part 1: Entering Your Rollover Details

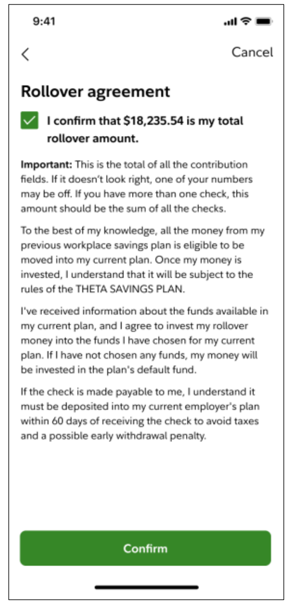
To begin, you need to capture the details of your rollover, including where the money is held today and the amount of your rollover.

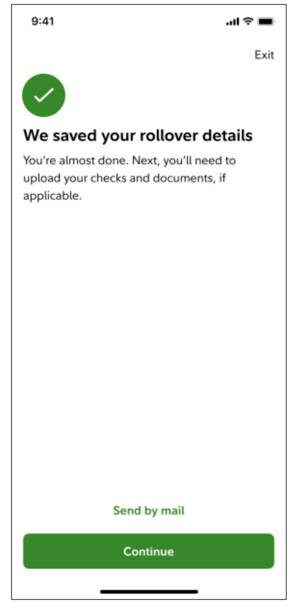
1. Log into the NB Smartphone app on your mobile device (available for Android and iOS).	
2. Select the account you'd like to roll money into.	

3. On the DC summary page for the plan, scroll down to the Actions menu and tap on "Explore rollovers".	
4. From the "Explore rollovers page", select the option "Move money into your employer retirement plan".	
5. You will need to provide answers to few questions related to your rollover like – type of contribution, rollover amount and the tax breakdown of the check.	

6. After confirming the rollover amount, you will continue in the app to upload your checks and any supporting documents.

   Note: You also have the option to send your documents by mail



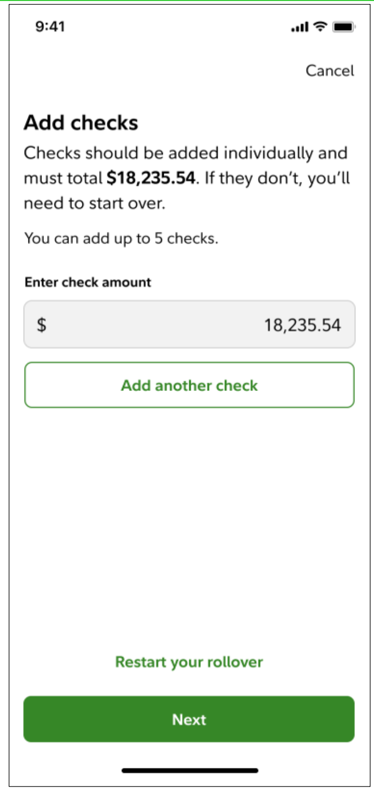


Part 2: Capturing Your Check

You can continue to use the NetBenefits app to submit your rollover check(s) and any supporting documents as indicated by your plan rules.

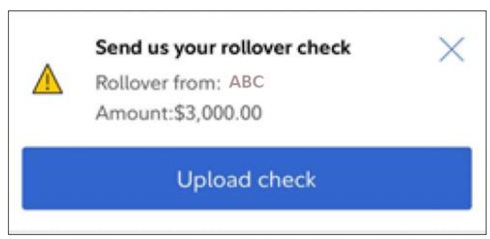
1. You'll enter the amount of your check(s), hit **"Next"**, and use your device's camera to take photos of the front and back of the check.

   Note: You may be asked to take photos of additional required paperwork.



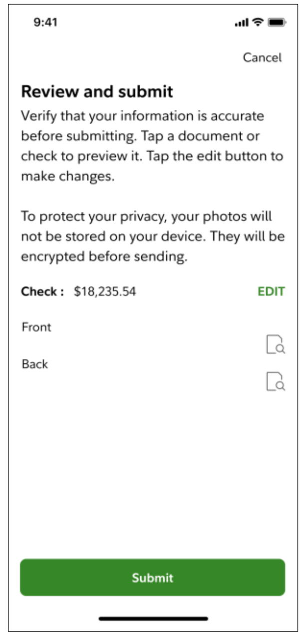
2. Alternatively, if you had started your rollover on NetBenefits website and saved your rollover information, you can use the NetBenefits app to submit your checks.
   You will see a message "Send us your rollover check" on the app's Home screen.

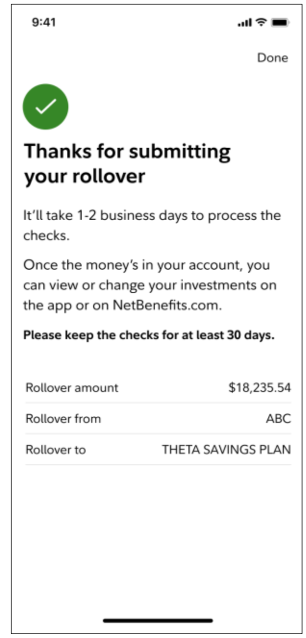
   Tap "Upload check" to deposit your check.

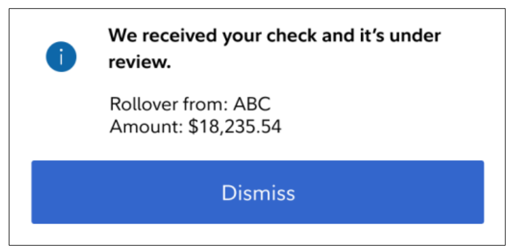


3. Next, tap on "Submit" to deposit the check(s).
   Once submitted, you will see a message on the app's Home screen that the check is received and under review.

   Note - You can come back to the app anytime after submitting the check to see whether your rollover is completed or needs attention.







All screenshots are for illustrative purposes.
**Please note that availability of this feature may vary based on your plan rules.*