Advisor Elite job aid:
Where to go for help
Silver Advisors

Always Designing for People®

Better serve your clients with easy access to the information, tools and resources you need to successfully manage your book of business with ADP.

Advisor Help Desk

Call 844-237-3548 or email advisorhelpdesk@adp.com

Hours of Operation:
Monday-Thursday 9 a.m. – 8 p.m. ET
Friday 9 a.m. – 6 p.m. ET

Call the Advisor Help Desk to get answers to questions, such as:

- General plan inquiries
- Initiating fund changes
- Plan pricing review
- Advisor Access portal login, navigation and review
- Employer contribution projections
- Initiating a Broker-Dealer/RIA change
- Compensation information
- Participant Education Support

Because plan changes require client authorization, contact Client Services regarding these requests with the client on the line or direct them to call our Client Services Team.

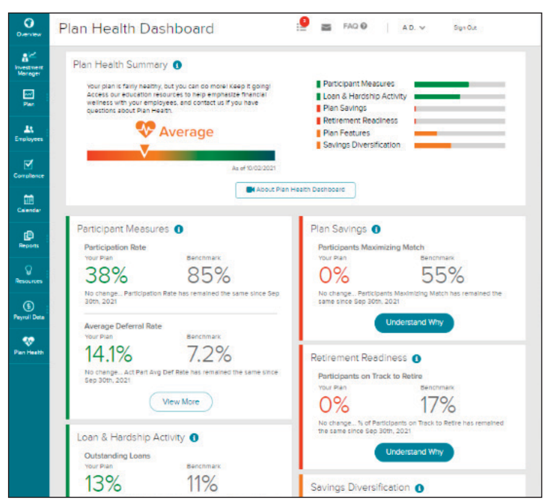
Advisor Self-Service Quick Tips

Advisor Access portal login: mykplan.com/sponsor

Get plan health data when you want it and make better decisions about your clients' plans and businesses using the Advisor Access portal and Financial Advisor Resource Page.

Plan Health Dashboard

Access the dashboard via the Advisor Access portal to explore detailed analytics around plan health and benchmark plan performance, investments and cash flow. To get to the dashboard from the Book of Business view, select a client's plan and



scroll until you see the Plan Health Summary link in the right sidebar. From the dashboard, you can also obtain:

- Total assets
- Number of active plans
- Average participant contribution rate
- Aggregate asset allocation
- Plan feature adoption
- Opportunities to increase overall plan health

Transfer files

From the Plan Overview page for a specific plan, mouse over Resources to select Transfer File and click on the Start Upload button.

Note: This is not applicable for terminated plans

Watch a video tour of the Advisor Access portal and discover how you can save time and manage your ADP book of business with ease. **Go to ADP.com/AdvisorAccess.**

ADP Advisor Access portal

Make better decisions about your clients' plans and business with greater visibility into your ADP retirement book of business. Whether you choose to access data via the dashboard, book of business, or all investments you'll find what you need to effortlessly manage your business with ADP.

Dashboard View – You'll find aggregate metrics such as participation, contribution, feature adoption and asset allocation across all investments. You can also track plans in implementation when you expand the Plans in Setup tile and find links to helpful resources, including our Advisor Resource page, ADP Accelerate, Financial Wellness Library and ADP Research Institute.

Book of Business View – Displays each plan you manage with balances, participation rates, year-end compliance test results and 5500 tax filing status. From the Book of Business screen, you can also drill down further by clicking the icons on the right to access the plan's investment scorecard and Plan Health Report. Hover on the three dot icon to obtain plan documents, compensation detail, generate standard and custom reports, retrieve and transfer files, and search employees.

All Investments View – Go deeper into plan investment lineups — from balances by individual funds to rates of return and expense ratios.

Portfolio Plan Health – Provides easy access to view our industry-leading Plan Health Score based on six key measures for your entire ADP book of business.

Advisor Resource Page

Go to: https://bit.ly/AdvisorResources

A dedicated destination for advisors to explore ADP's business-building tools, including our Web(k)ast Series, thought leadership, detailed videos covering the enrollment process and our award-winning ADP Achieve participant education collateral.

Client Services (For Plan Sponsors Only)

Call 800-929-2170

Hours of Operation:
Monday-Friday 9 a.m. – 8 p.m. ET

If you and your client have a dedicated Client Service Manager (CSM), please use them as the main contact for all inquiries. All other Plan Sponsors can call the number above to get assistance with a variety of questions, including::

- Plan design changes, amendments, and product enhancements
- 5500 tax filing and audit support
- Compliance test review and approval
- Contribution funding authorization
- Navigation of Plan Sponsor Website
- Participant Education Support
- Contact information for their dedicated Client Service Manager (if applicable)

Participant Services

Call 800-695-7526 or visit mykplan.adp.com

Hours of Operation:
Monday-Friday 8 a.m. – 9 p.m. ET

Participants can make changes to their account online or request information from either our Participant Service Representatives or by using the self-service interactive voice response system. They can get assistance with a variety of topics, such as:

- Enrollment
- Distributions
- Rollover monies into their ADP account
- Account balance and quarterly statements
- Make changes to contributions or their investment allocations
- Request a loan or withdrawal
- Investment performance information
- Financial Wellness tools and resources, including our Retirement Calculator
- And much more!

ADP RETIREMENT SERVICES | 71 Hanover Road | Florham Park, NJ 07932