

# Town of Grafton 403(b) Plan



## Easy On-Line Enrollment and Web Access

To enroll in the plan or access your account via the web, you will simply need to follow the instructions prompted on the web page and enter your choice of investments. All fields recognize upper and lower case characters; therefore, if you enter capital letters in your User Name or Password, the same upper or lowercase will be required each time you enter the information.

### Enrollment Process

Plan Website Address: <https://www.penserv.com/login> and select: [First Time Visitor?](#)

Enter: Your Social Security Number (example: 111223333)

Enter the Plan Access Code: **graf7452**

**Note: The *First Time Visitor* Code is not available to access your account after you have selected a username and password.**



#### Step 1 of 4 - Enter your Personal Information

Items marked with an asterisk (\*) must be completed before you can proceed to the next step.

- Username Information. This information is used to access your account, direct transactions and invest your contributions. The system is designed to protect your personal information; the codes you enter here should not be shared with another individual. For security purposes, you may not use sequential numbers or letters (i.e., 123 or abc), your name, Social Security Number, or symbols (i.e. @, !, &).
- Verification Question. This code is used as an identifier in case you forget your account password or need assistance from a participant services representative.
- Email address: Required for communication purposes and notification of changes applied to your account.



#### Step 2 of 4 - Deferral Elections

This window allows you to select the amount to contribute each pay period. Annual limitation information is also provided.

Check the  Box to indicate you are entering a deferral amount. Enter the salary deferral amount to be applied to each paycheck.



#### Step 3 of 4 - Select Investments for Your New Contributions

The investment election percentages you enter will be applied to the money source you selected. Please note that once you have completed the enrollment process, you can always change your investment election percentages.



#### Step 4 of 4 - Review and Confirm Your Entries

Please review the information you provided for the Plan. Be certain you check the entries carefully; the data will be used to establish permanent plan records and access to your account.

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**Congratulations! Your Enrollment is Complete**

You may access your account through the Plan's website (displayed above) at any time using your Username and Password. If you elected to receive email confirmations, you will receive confirmation of your enrollment at the email address entered during the enrollment process.

#### For Assistance

Participant Services Unit

800-849-4001

[403bservice@penserv.com](mailto:403bservice@penserv.com)