

How to Update My Personal Information



Table of Contents

Important Information — Read This First!	2
When Should I Update My Personal Information?	
About this Guide	
Updating Your Personal Information	3
Step 1: Connect to PlanConnect®	3
Step 2: Access Your Personal Information	4
Step 3: Enter the New Information	4
Step 4: Look for a Confirmation	4
Need Additional Help?	5

Important Information — Read This First!

Why Should I Update My Personal Information?

You should update your personal information if you:

- Change your name
- Have a new address
- Get a new phone number
- Change email addresses
- Would like to change your contact information

About This Guide

This “How to...” guide describes the most important steps needed to complete certain transactions using the PlanConnect® web site. Note that the web site may have changed since this guide was issued. If you have any questions about the guide or need additional assistance, please contact PlanConnect® using the contact information listed on the last page.

The examples appearing in the guide are for illustrative purposes only; the information you will see will differ.

Updating Your Personal Information

Step 1: Connect to PlanConnect®

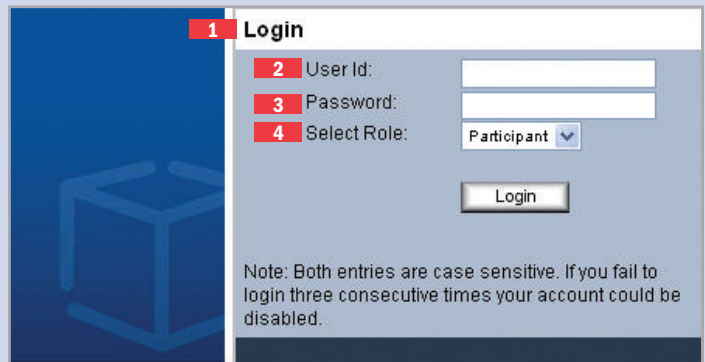
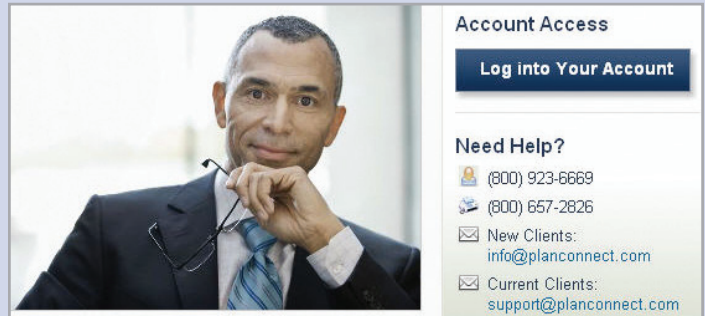
Go to the PlanConnect® Web Site

1. Open your web browser and go to www.planconnect.com.¹
2. Click on **LOG INTO YOUR ACCOUNT**.
3. The log-in window will open.

Log In to Your Account

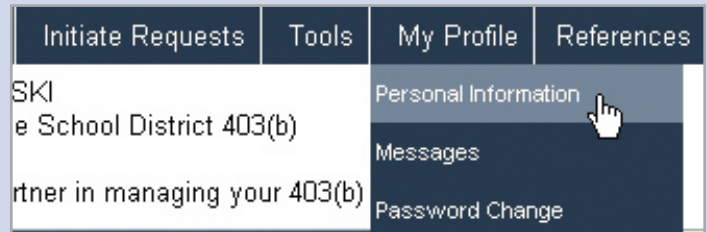
1. Enter your User ID.
If this is the first time you're logging in, you will be using your Social Security number.
2. Enter your Password.
If this is the first time you're logging in, use your date of birth in mmddyyyy order.
(e.g., July 20, 1987 would be 07201987.)
3. In the drop-down menu labeled "Select Role," verify **PARTICIPANT** is selected.
4. Click on the **LOGIN** button.

¹ This application is written to work with Firefox 2.0+, Internet Explorer 6.0+ and Safari 3.0+. While this application should work with browsers from Firefox or Internet Explorer that are within this version range, there may be versions designed specifically for AOL or Macintosh which may encounter problems with some JavaScript used in this site. Problems experienced with these browsers should be considered bugs in these browsers. You may contact your browser distributor about the problem. AOL subscribers may opt to use Internet Explorer or Firefox directly instead of going through the AOL browser. New devices such as wireless telephones, personal digital assistants, etc which are Internet accessible may not have browsers capable of properly navigating this site.



Step 2: Access Your Personal Information

1. Click on **MY PROFILE**.
2. From the drop-down menu that appears, select **PERSONAL INFORMATION**. The “Edit Personal Information” window will open.



Step 3: Enter the New Information

1. Update the screen with your new information.
2. Click **SUBMIT**.
3. If there is an error, click **RESET**.

A screenshot of two web forms. The top form is titled "E-Mail Addresses" and contains a checkbox for "I do not have an e-mail address" which is checked. Below this are three input fields for "Home e-mail address:", "Office e-mail address:", and "Other e-mail address:". At the bottom of this form are radio buttons for "Send e-mail notification to:" with options "Home", "Office", "Other", and "None*". The bottom form is titled "Alternate Verification" and contains a "Question:" dropdown menu with the text "what is your favorite car brand?" and an "Answer:" input field with masked characters "*****". Below these fields are "Reset" and "Submit" buttons.

Step 4: Look for a Confirmation

1. You will receive a confirmation by e-mail (if an active email address is on file) within an hour after your request has been received.

A screenshot of an email confirmation message. The header includes "Transaction Confirmation" and "Support@planconnect.com". The main body of the email states: "The following request has been processed by the plan administrator." Below this, it lists the participant's details: "Participant: Smokey Robinson", "Address: 5 Shark Blvd, Gatorville, FL 56939", "E-mail", and "Phone". At the bottom, it provides the plan name "Hitsville USA School District", the date and time of the transaction "8/11/2010 4:27:55 PM", and the type of transaction "Personal information change - A series of changes made over the Internet to your personal information."

Need Additional Help?

Need help updating your personal information? Call us at 800-923-6669 9:00 am – 5:00 pm Eastern Time.

To Contact PlanConnect®

Find us on the web at:
www.planconnect.com

Email us at:
support@planconnect.com

Call us at:
800-923-6669

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