



Welcome! The RMS Client Portal is being provided to you so you can easily access information on your plan, as well as transfer information and documents via a secure internet connection. This document is designed to help you access, navigate and get the most from our web portal.

## Logging in:

Open the internet and type in the top address window: <http://www.consultrms.com/secure-file-sharing/client-portal.html>. This brings you to a landing page on the RMS website for Client Portal File Sharing. Click [ACCESS CLIENT PORTAL LOG-IN](#).

In a separate letter, we provided you with your initial Username and Password.

As you are logging in, you'll be prompted to indicate that you are logging in as a Plan Sponsor.

When logging in for the first time, we encourage you to change your Username and Password.

### Usernames:

- Must be between 4 and 12 characters and may contain letters, digits and underscores
- The first character in the Username must be a letter
- The Username is not case sensitive

### Passwords:

- Six characters, letters or digits (i.e. alphanumeric)

If you forget your Password please contact your Account Executive or another member of their team.

## Navigating:

1. 'Upload': This provides a secure method to provide documents with PII (Personally Identifiable Information) to us, such as the Annual Plan Questionnaire, Annual Census, or distribution forms.
2. 'Download': This provides access to the client folder with reports, documents and forms. Some examples of what you can access: Annual Compliance Report, Form 5500, and Plan Documents.
3. 'Links': This provides several helpful links that we have added for your convenience.

We trust our web portal will provide a value-added service to enhance access to information on your plan and make it easier for you to provide us with up to date information for accurate and timely administration. If you have any questions please direct them to your Account Executive.