MissionSquare RETIREMENT

# Establishing or Accessing Your SDBA

This how-to guide provides you with everything you need to know to open a new MissionSquare Retirement Brokerage Account or access your existing MissionSquare Brokerage Account through the participant website.

## Opening a New MissionSquare Brokerage Account

**Step 1:** To open a new MissionSquare Brokerage Account, please navigate to your **My Portfolio** page. This can be found under the **My Account** tab.

**Step 2:** In the top right-hand corner, please select **Change Investments**.

**Step 3:** On the far right, please select **Choose My Investments** and click **Continue**.

**Step 4:** Select **Switch your current investments** option.

**Step 5:** Here you are presented with your investment options that you may exchange out of and move into your MissionSquare Brokerage account. Please make your selections and click **Continue**.

**Step 6:** Select either the **MissionSquare Brokerage** or **MissionSquare Roth Brokerage** investment option to transfer assets to, along with the percentage that you are transferring, then click **Continue**.

**Step 7:** Follow the instructions on the Charles Schwab site to open your brokerage account.

**Step 8:** Once you have established your brokerage account with Charles Schwab, you will be redirected to complete the initial transfer of cash into your newly established brokerage account.

MissionSquare Retirement may charge a one-time $50 set-up fee for establishing each Personal Choice Retirement Account (PCRA) regardless of whether you fund the PCRA or not. MissionSquare may also charge a quarterly fee of $12.50 ($50 annually) to maintain each PCRA. Please check with your plan sponsor or contact MissionSquare Plan Services at (800) 669-7400 to confirm whether you will be subject to fees.

**NOTE:** Once your MissionSquare brokerage account has been established and for future funding requests, you may use the **Choose My Investments/Switch Your Current Investments** feature to transfer funds into or out of your brokerage account.

## Accessing Your Existing MissionSquare Brokerage Account

**Step 1:** To access your existing MissionSquare Brokerage account, please navigate to your **My Portfolio** page. This can be found under **My Account Information**.

**Step 2:** In the top right-hand corner, please select **Change Investments**.

**Step 3:** You will see a gray banner at the top of the screen. Please select **Click Here** and you will be taken to your Schwab login page.