Go-Retire On-Line Retirement Plan Participant Account Access

EPIC Retirement Plan Services

Go-Retire includes several features that help you discover and maximize the value of your retirement plan. Follow the directions on the right to access your account or, if available, enroll in your employer sponsored retirement plan.

1. Navigate www.go-retire.com
2. Choose Participant from the Login As panel.
3. Enter your User ID and Password.

Account Info

Quarterly Statements
The most recent available quarterly statements.

Custom Statements
Generate a statement for a custom time period.

Account Summary
View your current account by fund or source, including share prices, election percentages and total values.

Trade History*
View account activity including contributions, fees, distributions, or transfers.

Rate of Return
Shows what the rate of return is for a fund(s) for a specified period of time.

Current Loans*
Shows any current outstanding loans.

Transactions

Deferral Change*
View or change the contributions that come from your pay.

Investment Elections
View or change the way your future contributions are invested.

Fund To Fund Transfers
Transfer money between available investment options.

Rebalance*
Realign your account to your investment elections.

Loans*
Use the Loans Wizard to model or request a loan.

Distributions*
Confirm availability and request a distribution from your account.

Web Transaction Status
View completed and pending transactions

SDBA*
A Self-Directed Brokerage Account ('SDBA') allows you access to a wide array of investment choices beyond the core investment options in your retirement plan.

Resource Center

Fund Central
View information for your plan's available investment options, including performance and fees.

My Retirement Goal
Tool to help you figure out how much to save to try to meet your retirement goals

Financial Wellness
Access additional financial tools and links to help you determine your tolerance for risk and evaluate your financial health.

Education Center
A collection of resources to help you better understand your retirement plan and the vital role it plays in helping you achieve your retirement goals.

Plan Contacts
Find contact information for your plan sponsor and the participant service center.

SmartPlan
This is an Interactive Video-Based Retirement Planning Tool

Personal

Account Maintenance
Update your contact information, sign up for monthly statements, and change your security settings.

Designate Beneficiaries*
Allows you to designate your beneficiaries.

Financial Wellness

If you need a replacement Password…

In the event that your Password is lost or forgotten, you may use the Password reset tool on the web or request a replacement Password by calling the Participant Service Center(PSC) at 1-800-716-3742, Monday through Friday, 6:00AM to 8:00PM EST, and pressing *0 to speak to a PSC Representative.
A password will be generated and sent to the e-mail address you entered into the system when you set up your account.

*** Some features are optional and may not be available for your plan.**