



# Retirement Plan Enrollment

## How to Set Up Your Account

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### Identity Verification

**Step 1: Go to [www.mutualofamerica.com/signup](https://www.mutualofamerica.com/signup).**

- Enter your personal information (last name, DOB, Zip Code and last four digits of SSN), and then your information is verified against our database to confirm that you have an active plan account. *(If the data entered does not match, you'll receive an error message and will need to correct the data before moving forward.)*

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MY ACCOUNT

Verify your identity

Last Name

Date of Birth

Zip Code

Last 4 Digits of SSN

Continue

Cancel

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## How to Set Up Your Account (continued)

### Identity Verification

**Step 2: Answer your security questions.**

- Your answers are submitted to Experian when you click **"Submit."**

*(If you answer a question incorrectly, you'll receive an error message. Select "Try again" to restart the Identity Proofing process.)*

MY ACCOUNT

#### Security Questions

1 I was born within a year or on the year of the date below.

☐ 1954  
☐ 1957  
☐ 1966  
☐ 1969  
☐ NONE OF THE ABOVE/DOES NOT APPLY

2 Using your date of birth, please select your astrological sun sign of the zodiac from the following choices.

☐ AQUARIUS  
☐ LIBRA  
☐ SAGITTARIUS  
☐ GEMINI  
☐ NONE OF THE ABOVE/DOES NOT APPLY

3 Using today's date to determine your current age, how old will you be in exactly 5 years?

☐ 64  
☐ 66  
☐ 68  
☐ 70  
☐ NONE OF THE ABOVE/DOES NOT APPLY

4 Which of the following represents the last four digits of your primary checking account number?

☐ 6556  
☐ 6555  
☐ 6574  
☐ 6583  
☐ NONE OF THE ABOVE/DOES NOT APPLY

5 According to your credit profile, you may have opened a mortgage loan in or around December 2017. Please select the lender to whom you currently make your mortgage payments. If you do not have a mortgage, select "NONE OF THE ABOVE/DOES NOT APPLY."

☐ NEW YORK FEDS  
☐ WASHINGTON FEDERAL SVGS  
☐ MANCHESTER MORTGAGE  
☐ MOUNTAIN AMERICA MORTGAGE  
☐ NONE OF THE ABOVE/DOES NOT APPLY

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## How to Set Up Your Account (continued)

### Account Setup

**Step 3: Set up username and password.**

- After establishing your username and password, you'll need to enter your email address and choose a security question from the dropdown under "Choose a forgot password question" and provide the appropriate response in the "Answer" field.
- You will receive a confirmation email that includes a verification link.
- After you complete the email verification, you will be directed to the page to set up Multifactor Authentication.

MY ACCOUNT

#### Sign Up

Username \*

Email \*

Password \*

Confirm Password \*

Choose a forgot password question

What is the food you least liked as a child? ▾

Answer \*

\* Required field

[Back to Login](#)

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## How to Set Up Your Account (continued)

### Multifactor Authentication

**Step 4: Set up Multifactor Authentication.**

- You must complete at least one security factor to complete the registration process. Clicking on “Set Up” displays the enrollment form for each factor.
- There are four security factors available: Okta Verify (which requires installing the Okta app on your phone), SMS Authentication, Voice Call Authentication and Email Authentication.
- The security factor you select will be the method we use to contact you for identity verification during subsequent login attempts to your account.

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## How to Set Up Your Account (continued)

### Multifactor Authentication (continued)

**Step 5: Enter information for your selected factor. (Example uses SMS Text security factor.)**

- Enter your phone number and click “Send code.”
- You will receive a text message that includes the authentication code.
- Enter code to complete Multifactor Authentication process, or select additional security factor.
- Lastly, click “Create your secure account/Sign Up,” and then go to SmartPlan to enroll.

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