ADMIN316 ADVISOR PORTAL

Quick-Start Training Guide

How to sign in, find your way and get the work done.

advisors.admin316.com · service@admin316.com

Screens show a sample advisor and made-up plans.

START HERE

Your first 15 minutes

Do these ten things once and you will know your way around.

- [ ] Sign in at advisors.admin316.com with the email and password we sent you.
- [ ] Change your password: Settings, then Password.
- [ ] Open This week and send one birthday or anniversary note.
- [ ] Open My clients and click into your largest plan.
- [ ] Add a stage and a note under Your notes on this plan.
- [ ] Open Participants, then the Termed with balance tab.
- [ ] Open Marketing. No market yet? Enter your branch zip.
- [ ] Open the Call list and read one call script.
- [ ] Watch the training video and open the Academy.
- [ ] Send one test question with Ask Admin316.

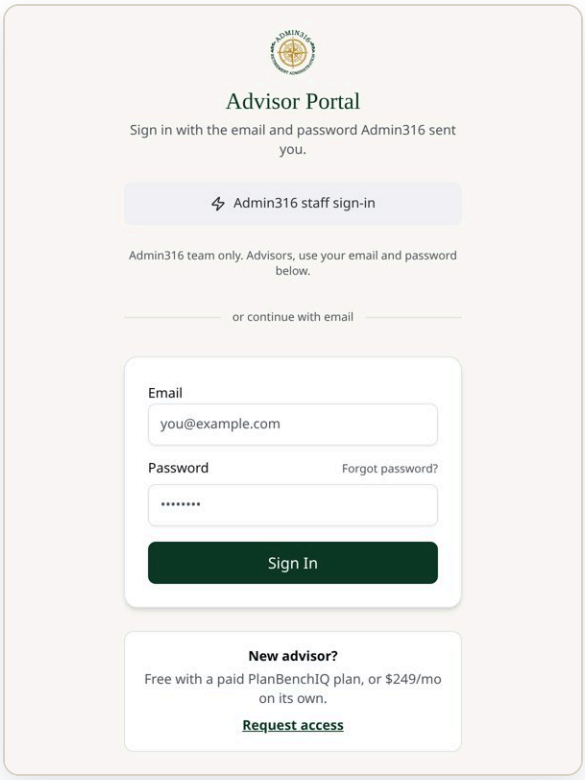
THE LEFT MENU

This week · Home · My clients · Sponsor meetings · Participants · PlanBenchIQ · Plan designs · Reviews we built · Call list · Marketing · Education videos · Academy · Settings · Sign out

TASK 01

Sign in

Your login is the email and password in your welcome email from Admin316.



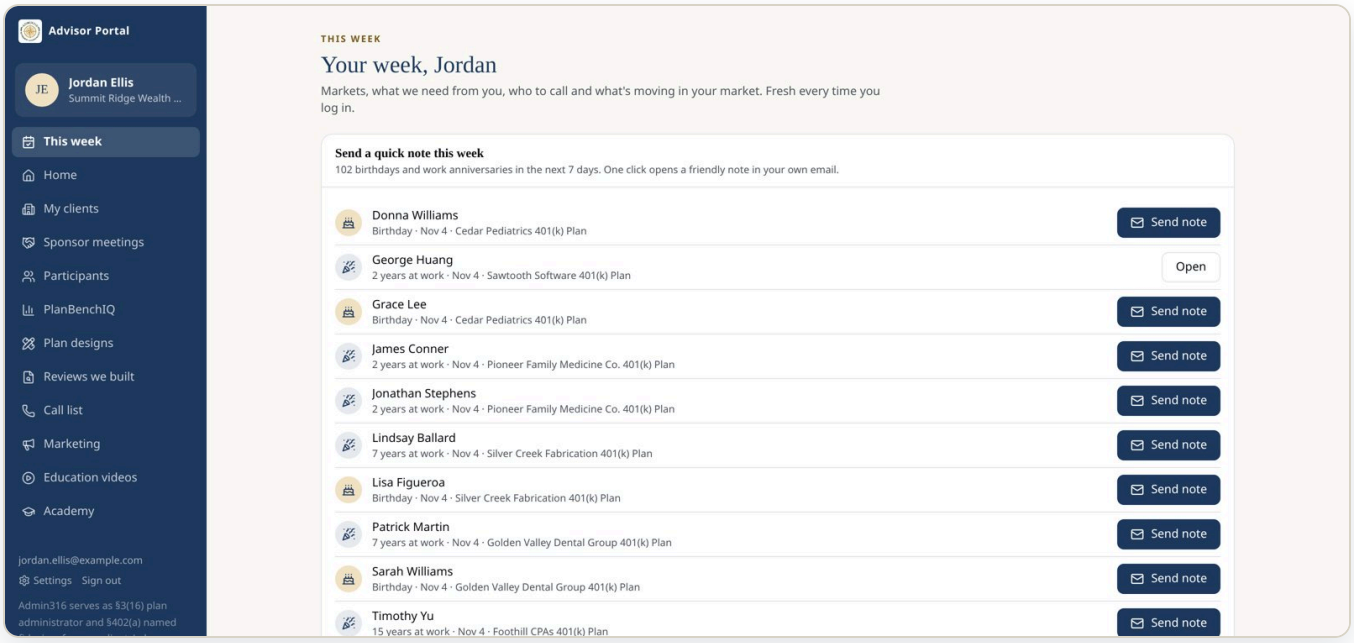
1. Go to **advisors.admin316.com** and bookmark it.
2. Under “or continue with email”, type your email and password.
3. Click **Sign In**. Skip the “Admin316 staff sign-in” button; it is for our team.
4. Forgot your password? Click **Forgot password?** and we email you a reset code.
5. To change your password later, open **Settings** at the bottom of the left menu.

> If you see “This login isn't linked to an advisor yet”, email service@admin316.com.

TASK 02

This week: your start page

You land here every time you sign in. It is rebuilt each visit.



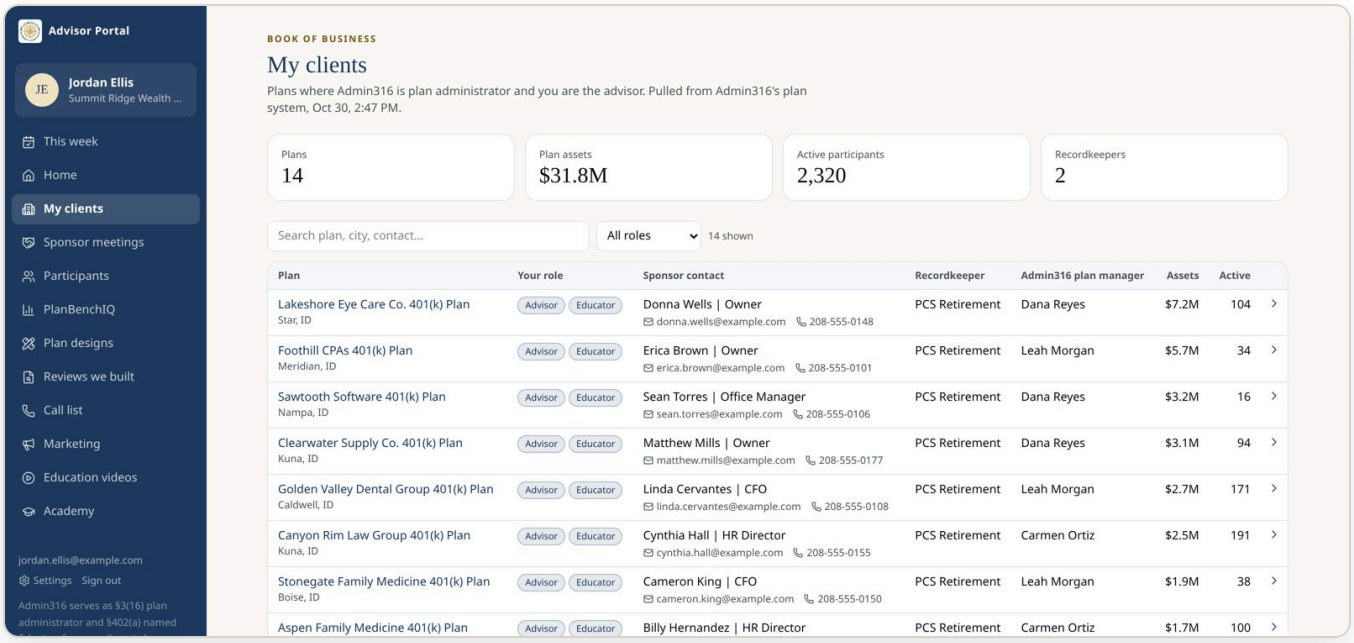
1. **Send a quick note this week** lists birthdays and work anniversaries in your clients' plans over the next 7 days.
2. Click **Send note**. A friendly message opens in your own email. Edit it, then send.
3. Scroll down for the Monday market brief, **Things we emailed you about and need back**, and **Reasons to call this week**.
4. Have a plan question? Use **Ask Admin316**: pick the plan, type, send. Your plan manager answers on this page.

> Click **Home** for a one-page summary. Every number card there is a link to the list behind it.

TASK 03

My clients

Every plan where Admin316 is plan administrator and you are the advisor.



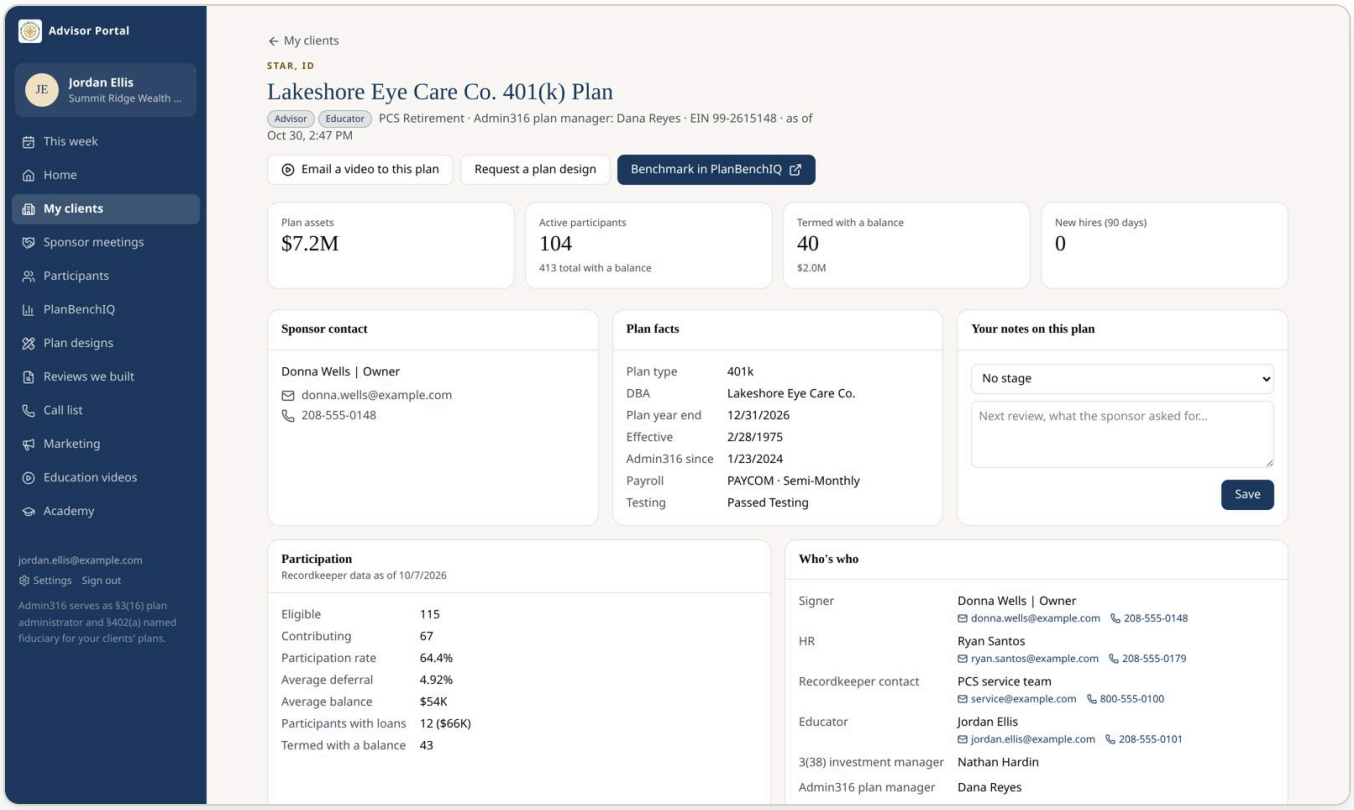
1. Click **My clients** in the left menu.
2. Search by plan, city or contact, or use **All roles** to filter by your role.
3. Each row shows the sponsor contact, recordkeeper and your Admin316 plan manager.
4. Click a row to open the plan page. Click **Email all** to write to everyone at that company.

> A plan missing or a contact wrong? Email service@admin316.com with the plan name.

TASK 04

The plan page

Everything about one plan in one place.

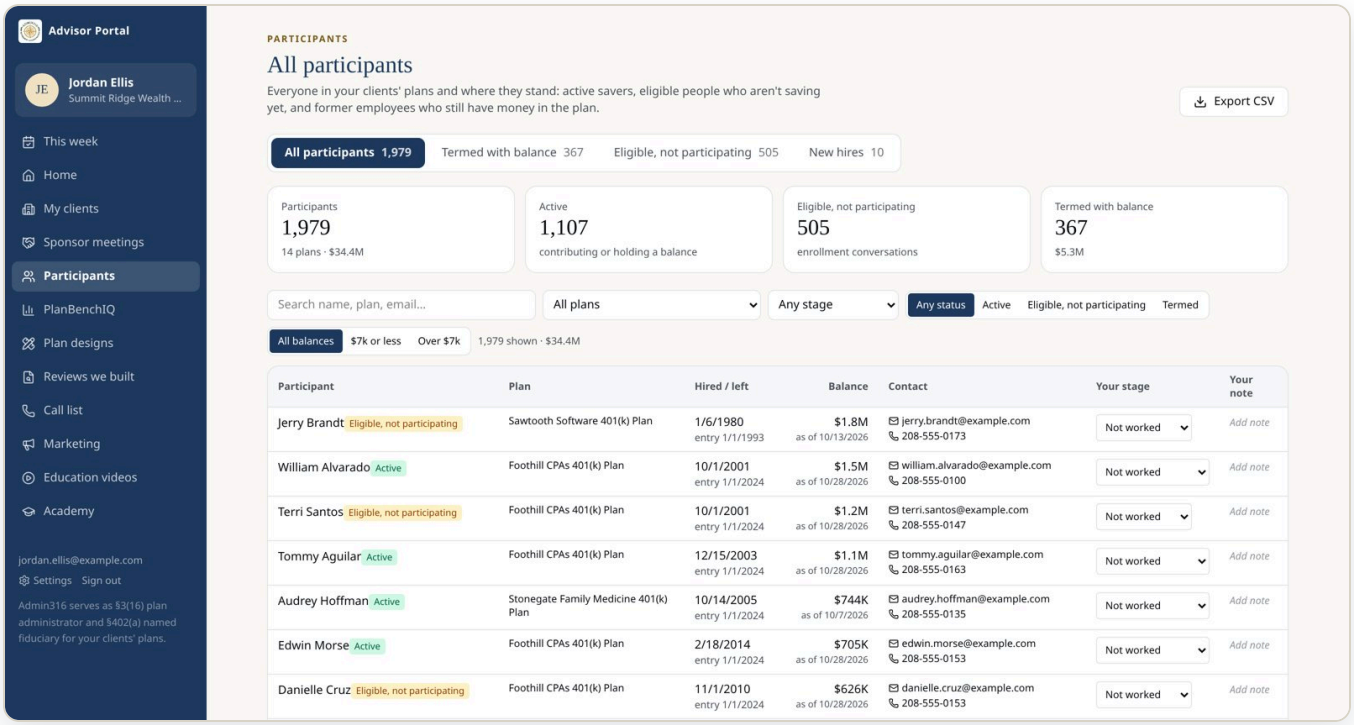


1. Check the cards: plan assets, active participants, termed with a balance, new hires.
2. Under **Your notes on this plan**, pick a stage, type a note and click **Save**.
3. Scroll for **Participation** (rate, average deferral) and **Who's who**.
4. Top buttons: **Email a video to this plan**, **Request a plan design**, **Benchmark in PlanBenchIQ**.

TASK 05

Participants

Four tabs, four kinds of conversations.



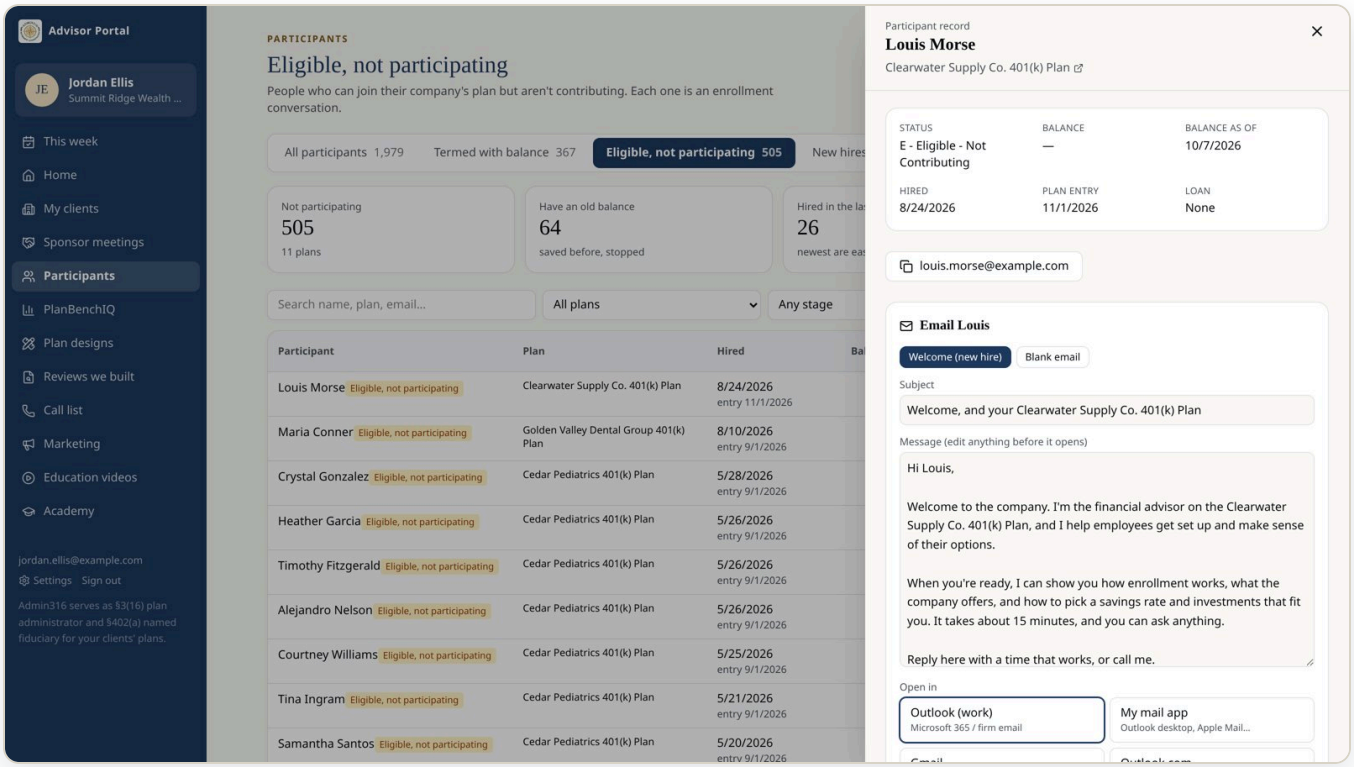
1. Pick a tab: **All participants**, **Termed with balance** (rollover talks), **Eligible, not participating** (enrollment talks), or **New hires**.
2. Narrow the list with the search box, plan and stage menus, and the status and balance buttons.
3. On each row, set **Your stage** (for example Reached out or Meeting set) and click **Add a note**.
4. Click **Export CSV** to download the list on screen.

> Exported files hold personal data. Store them under your firm's privacy rules.

TASK 06

Email a participant

The portal writes the draft. You send it from your own mailbox.



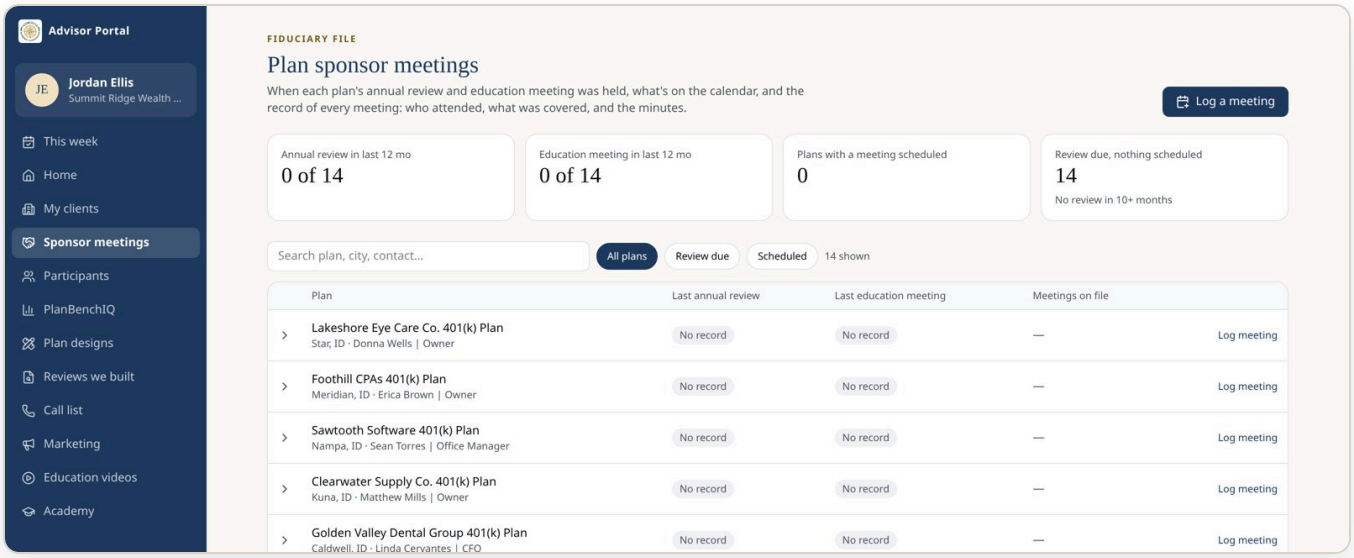
1. Click a person's name to open their record.
2. Under Email, pick a template, such as **Welcome (new hire)** or **Balance options (former employee)**.
3. Edit the subject and message.
4. Under **Open in**, choose Outlook (work), My mail app, Gmail or Outlook.com, then send it yourself.

> The portal never sends participant email for you.

TASK 07

Sponsor meetings

Keep each plan's fiduciary file current.

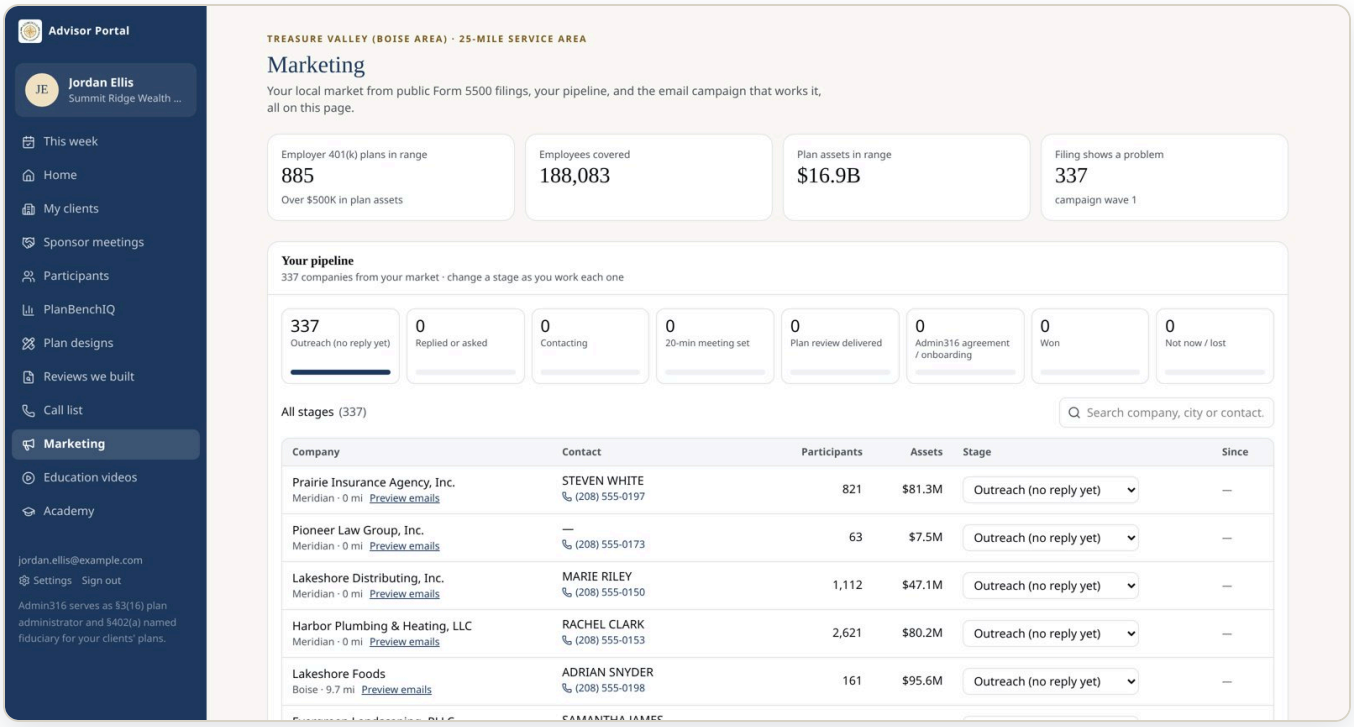


1. Click **Log a meeting**, or **Log meeting** on a plan's row.
2. Pick the plan, type, date and where (Zoom, Teams or on site).
3. Tick the topics, add attendees, minutes and follow-ups. Use **Attach file** if you have one.
4. Click **Save meeting**. Use **Review due** to see which plans need one.

TASK 08

Marketing

Your local market, pipeline and email campaign.



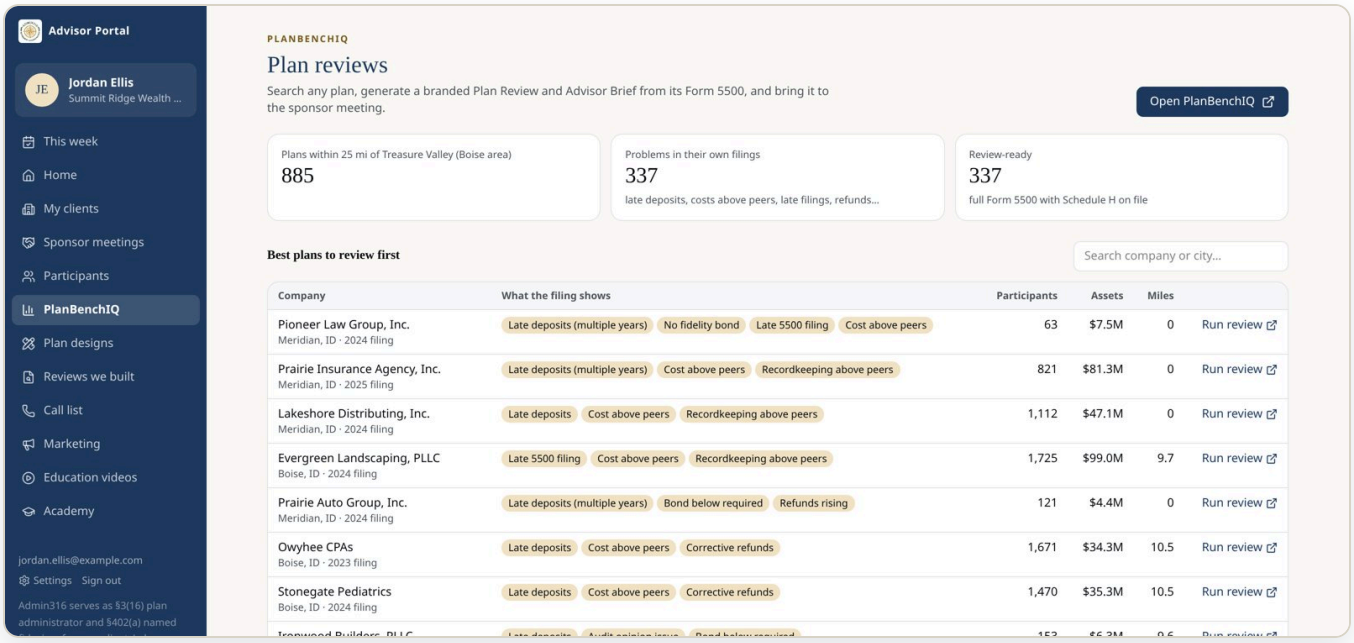
1. See employer 401(k) plans within 25 miles of your office, from public Form 5500 filings.
2. In **Your pipeline**, change each company's stage as you work it.
3. Click **Preview emails** to see what a business owner receives.
4. No market yet? Enter your **Branch zip**. Your first market is free and we build it for you.

> Nothing goes out under your name until your firm's compliance approves it.

TASK 09

PlanBenchIQ

Local plans worth reviewing first, with the problems their own filings show.



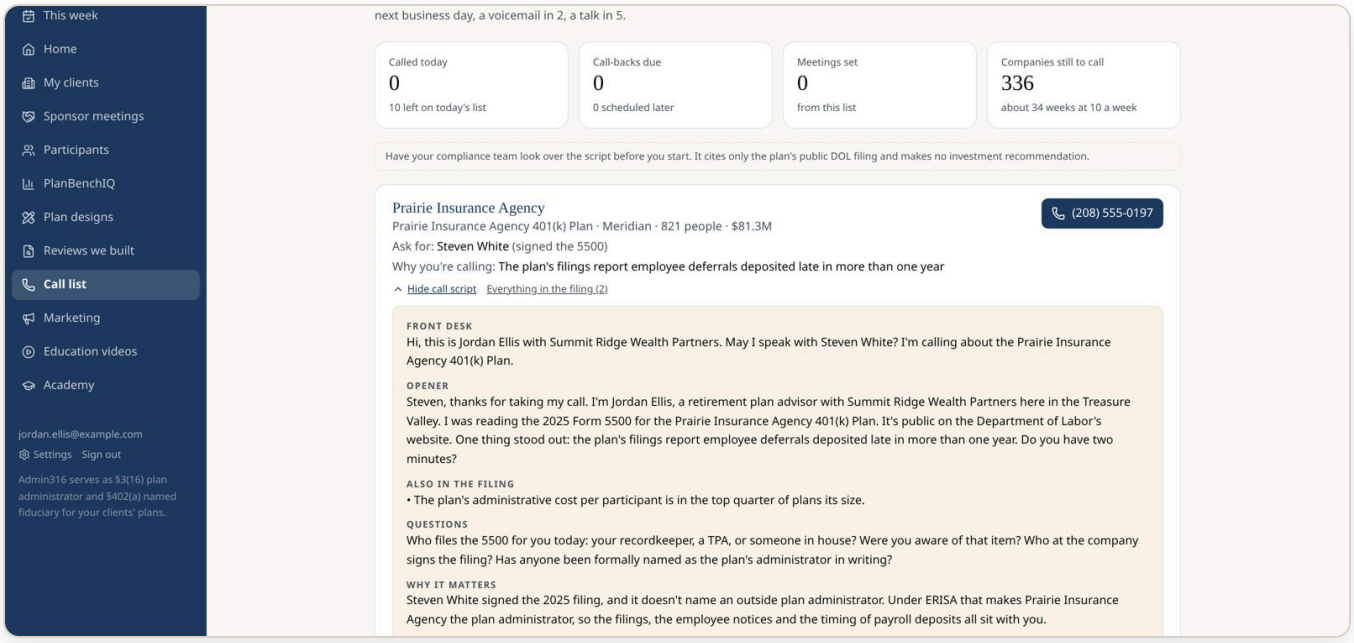
1. Scan **Best plans to review first** and the flags beside each company.
2. Click **Run review**. PlanBenchIQ opens in a new tab.
3. Build the branded Plan Review and Advisor Brief there for your meeting.

> This list needs a paid PlanBenchIQ plan under the same email as your portal login. It switches on automatically.

TASK 10

Call list

Ten new companies a week from your market, plus call-backs that are due.



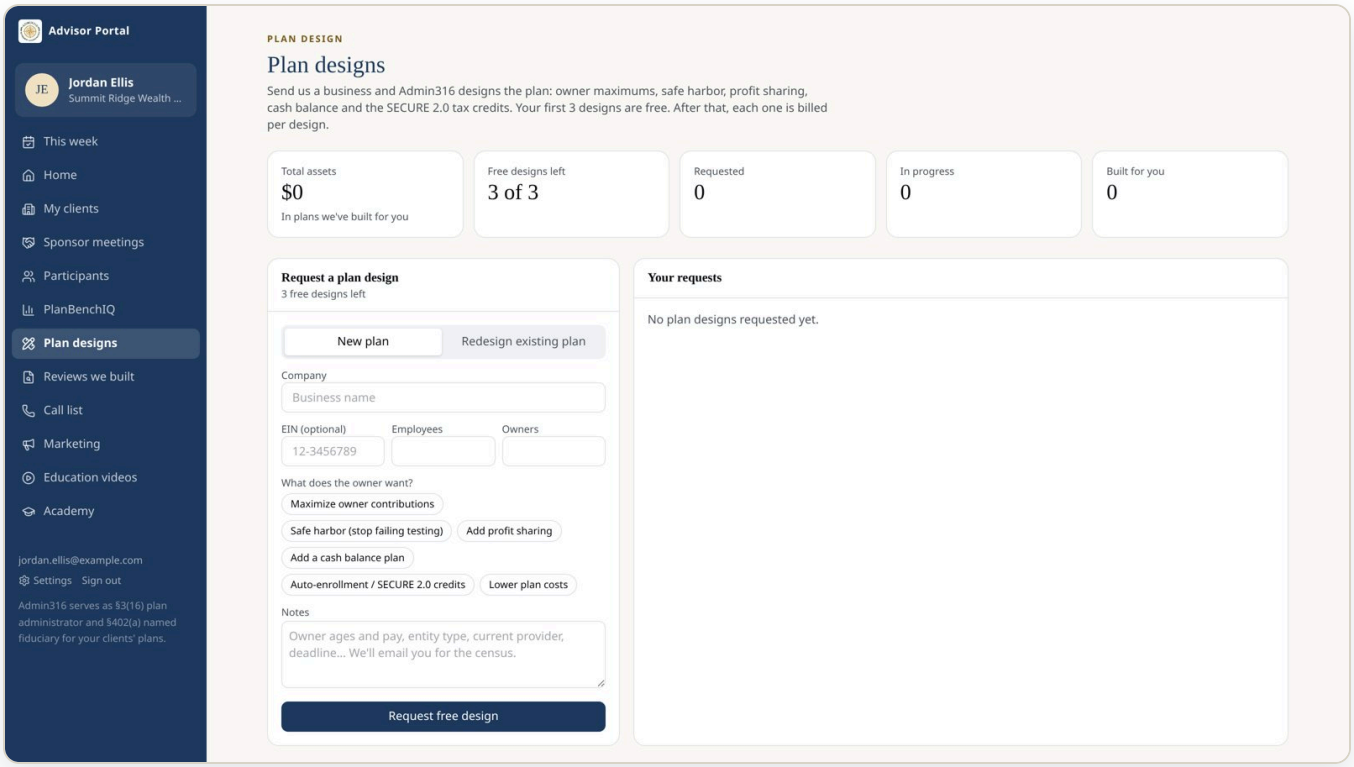
1. Click the phone number to call.
2. Click **Show call script**: front desk, opener, questions, why it matters.
3. Type an optional note, then tap the result: No answer, Left voicemail, Talked, call back, Meeting set, Not interested, or Wrong number.
4. The call-back is scheduled for you. **Undo** reverses a tap.

> Have your compliance team review the script before you start.

TASK 11

Plan designs

Send us a business and Admin316 designs the plan.



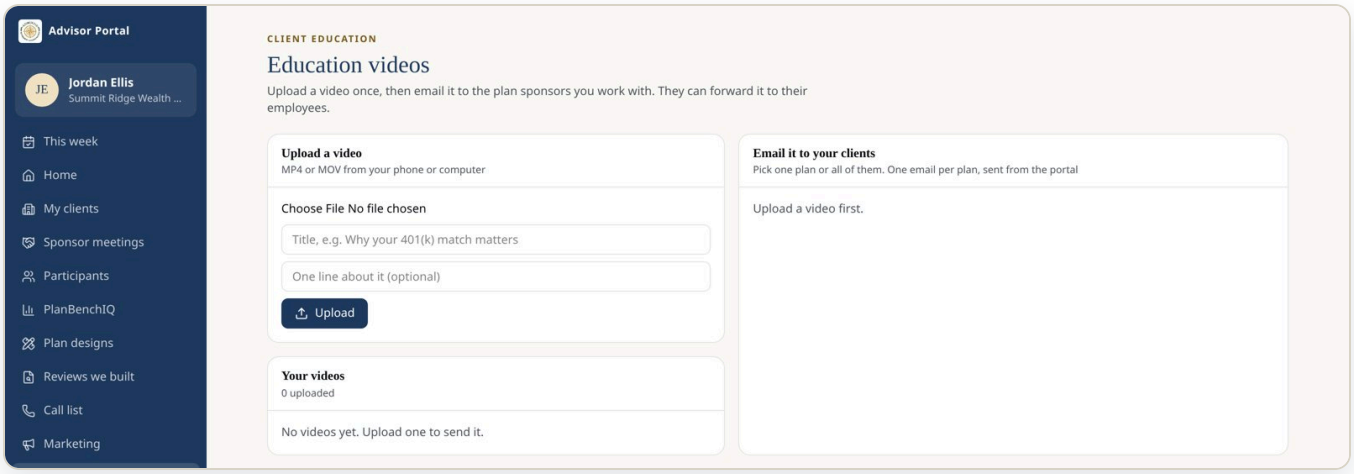
1. Choose **New plan** or **Redesign existing plan**.
2. Enter the company, employees and owners. Tick what the owner wants.
3. Add notes such as owner ages, entity type, current provider and deadline.
4. Click **Request free design**. Track it under **Your requests**. We email you for the census.

> Your first 3 designs are free. For a redesign, attach the 408(b)(2) disclosure and SPD, or send them later.

TASK 12

Education videos

Upload once, send to one plan or all of them.

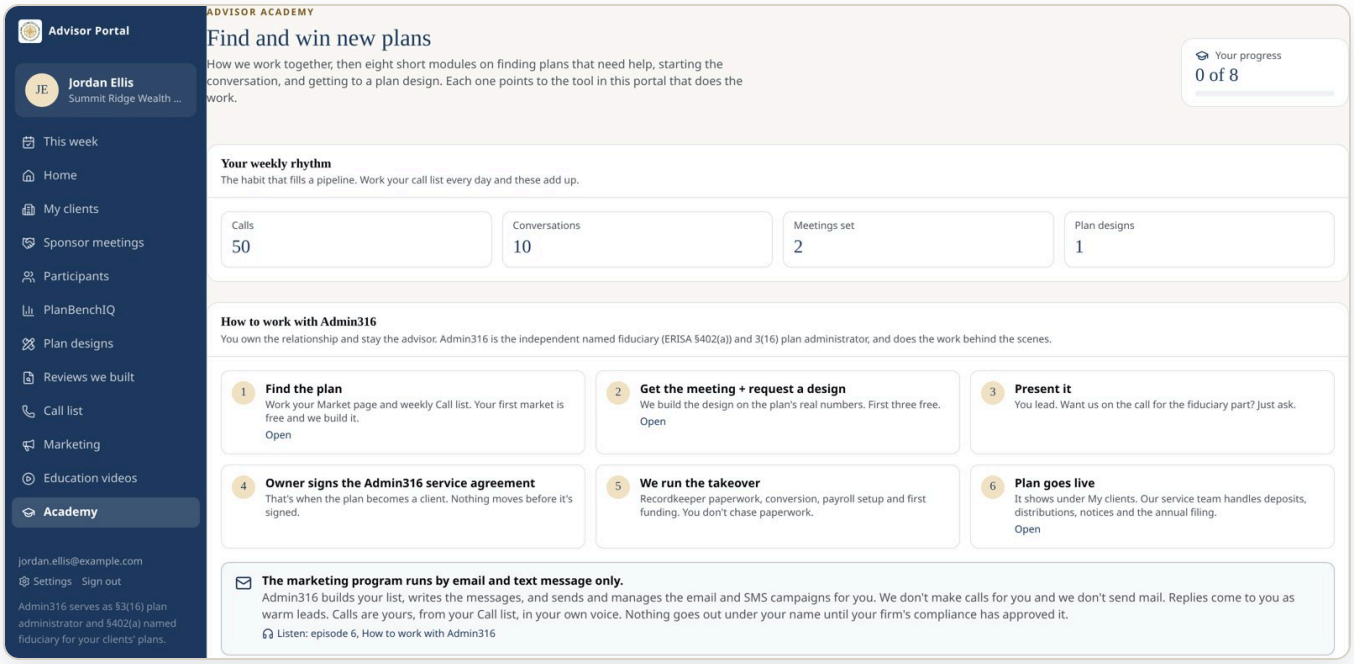


1. Under **Upload a video**, choose an MP4 or MOV file, add a title, click **Upload**.
2. Under **Email it to your clients**, pick **One plan** or **All plans**.
3. Click **Send me a test** first, then send.

TASK 13

Academy and how we work together

Eight short modules and a podcast, each tied to a tool in the portal.



1. You find the plan and stay the advisor.
2. Admin316 builds the design on the plan's real numbers. You present it.
3. The owner signs the Admin316 service agreement. We run the takeover.
4. The plan shows up in My clients. Our team handles deposits, distributions, notices and the annual filing.

> Admin316 serves as the independent ERISA §402(a) named fiduciary and §3(16) plan administrator.

QUESTIONS

FAQ

Which sign-in button do I use?
The email and password fields, then Sign In. Not the staff button.

Does the portal email participants for me?
No. It opens a draft in your own mailbox and you send it.

A plan is missing from My clients.
Email service@admin316.com with the plan name.

What does “Termed with balance” mean?
Former employees who still have money in the plan.

Why can't I see the PlanBenchIQ list?
It needs a paid PlanBenchIQ plan under the same email as your login.

How do I get my local market?
Marketing, then enter your Branch zip. The first one is free.

Do campaign emails go out under my name right away?
No. Nothing goes out until your firm's compliance approves it.

How many free plan designs do I get?
Three. Advisors with more than 30 plans with Admin316 get unlimited.

My Academy progress reset.
It is saved in your browser, so a new device starts at zero.

Can the team give investment or tax advice?
No. Plan questions go to your plan manager through Ask Admin316.

Where to get help

1. Training Center assistant. Ask any question about the portal, day or night.

2. Ask Admin316 on This week for anything about a specific plan. It goes to your plan manager.

3. service@admin316.com for logins, billing and anything else.