

MY ALERUS ACCESS



YOUR PERSONAL HUB TO TRACK AND IMPROVE ALL OF YOUR FINANCIALS

1. Go to **alerusrb.com**, click **Log in**, select **My Alerus**, then click **Go**.
2. The first time you log in, you will need to create an account. Click **Sign Up** or **Create Account**. You will need your Social Security number and date of birth. You will also need one of the following:
 - Hire date
 - Alerus retirement plan number
 - Alerus bank account number
 - Alerus bank debit card number
 - Alerus wealth management account number
3. Next, you will be presented with an electronic consent form and terms and conditions. Review and click **Accept**.
4. On the next screen, select a phone number and your preferred method of authentication (text or call). Review and click **Submit**.
5. Enter the six-digit code sent via text or call and click **Submit**.

ACCOUNTS

- View your accounts and any non-Alerus accounts you have linked in.
- Add linked accounts by providing your log-in data so your accounts can be automatically updated.
- Manually add accounts. You will need to update balances yourself.

The screenshot displays the 'My Alerus' Personal Hub interface. On the left, the 'ACCOUNTS' section shows a list of linked accounts: Properties (\$68,500.00), Health & Benefits (\$1,011.13), and Retirement (\$102,314.16). Below this is a 'CONNECT ACCOUNTS' section with a message: 'You're missing out on the following account categories: Investments, Credit Cards, Cash Accounts, Loans, Insurance' and a 'Connect Accounts' button. The right side of the interface features the 'FINANCIAL WELLNESS' section, which includes a progress indicator showing '3/5' workouts completed, a 'Keep up the good work!' message, and a list of wellness activities: Emergency Savings, Debt Management, Retirement Planning, Insurance Management, and Health Savings Accounts. Below this is the 'MY BUDGET' section with a message: 'Smarter spending and saving can make a big impact on your financial health. Not sure where to start?' and an 'Add a Budget' button. At the bottom right, there is a 'MY ADVISOR' section with contact information: My Alerus Advisor, 833.325.3787, alerus@alerus.com.

BUDGET

- Create a personalized budget.
- View a summary of your income and spending.

FINANCIAL WELLNESS

The Financial Wellness score guides you through a series of workouts to see how you're doing to:

- Ensure you're saving for emergencies.
- Create a plan to manage your debt.
- Confirm you can retire on time.
- Be certain that your insurance will protect you from unexpected events.
- Maximize the benefits of health savings (if applicable).

The screenshot shows two screens from the My Alerus app. The left screen is titled 'FINANCIAL WELLNESS WORKOUTS' and features a progress indicator showing '3/5' workouts completed. Below this is a 'Keep up the good work!' message: 'You've completed 3 out of 5 workouts. Just two more to go to see your overall score.' There are three progress bars: 'Emergency Savings' (0 out of 20), 'Debt Management' (30 out of 30), and 'Retirement Planning'. The right screen is titled 'Financial Wellness' and features a video player with a play button and a progress bar. Below the video player is a disclaimer: 'The Financial Wellness tools are for informational purposes only and should not be considered investment, tax, or financial advice.' The video player shows a play button and a progress bar.

DOWNLOAD THE APP*

- Search **My Alerus** in either the App Store or Google Play to download our mobile app.
- The app uses the same username and password as the desktop version.



FOR MORE INFORMATION

Client Service Center

833.325.3787

alerus@alerus.com

* Alerus charges no fees to download or use the app. However, your carrier's message and data rates may apply.

This information is provided for informational and discussion purposes only.

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