

Register for your benefits plan online



Welcome to your new benefits plan! This guide will walk you through the steps to register for the plan online. You will need:

- Your Social Security Number
- Access to your phone or email to receive a security code

If you need help, please contact us at 866-968-5363 or your plan sponsor.

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Go to the plan website and choose “Register”

Open an internet browser and go to <https://sun.retirement.schwabrt.com/participant/>. Click on the link that says, “Register to access your account.”

Welcome
Log in to your account.

Login ID

Password

Log In

[Register to access your account](#)

[Forgot Login ID](#) [Español](#)
[Forgot Password](#) [Plan Sponsor/Advisor Login](#)

BROWSER REQUIREMENTS CONTACT US

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Enter your information

The next screen will ask for some basic information about you and your benefits plan. Fill out as much as you can to help the system identify you. Then click **Continue**.

Note: You must enter at least one email address or phone number.

Let's get started

Tell us a little about yourself and your plan. [Help](#)

Personal Information
We need this information to identify you and your account. Use your legal name, not a nickname.

First Name

Last Name

Social Security Number

Confirm Social Security Number

Date of Birth (mm/dd/yyyy)

Contact Information
Please provide at least one way for us to contact you.

Home Phone Number

Mobile Phone Number

Personal Email Address

Workplace Information
If your employer has provided you with this information, enter it below.

Plan ID

Plan Passcode

Work Phone Number

Work Email Address

Employee ID

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Verify your identity

After submitting the form, you should receive a security code via email or text message. Enter the security code and then click **Verify**.

Note: It may take a few minutes for the code to arrive. If you do not receive a code, you can select the option to **Send a new code** or click **Help** (in the upper right corner) to contact your plan's administrator.

Two-step verification

Check your email or phone for a security code. This code will expire in 15 minutes. [Help](#)

Enter Security Code

Didn't receive? [Send a new code](#)

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Create login credentials and security questions

Next, you'll need to set up your account. Follow the instructions on screen to create a Login ID, password, and security questions. Then click **Continue**.

Note: If you already have an account on our system, you won't see this screen. Instead, you'll be asked to log in using your existing Login ID and password.

Welcome, Jennifer [Help](#)

Create a Login ID and password to complete registration.

Login ID

Confirm Login ID

Password

Confirm Password

Security Question 1

Security Answer 1

Security Question 2

Security Answer 2

Security Question 3

Security Answer 3

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Log in to finish setting up your account

If your account has been created successfully, you will see the message below. You can now return to the login page and log in to continue setting up your new account.

Registration Confirmation

 Your registration is complete. To access your account, [log in](#) using your new credentials

[Return to Login](#)

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