

BANKING WEALTH INSURANCE

Retrieve Your BIN Number via Plan Report

Once you are logged into our system, you will need to navigate to:

Forms & Reports > Reports: Generate Reports > Select Report Group: Queries > Report Selection: Plan Balances By Fund > Divisions: All > Select Employee: All Employees > Balance Based On: Trade Date > Select Export File Type: Excel > Available Plan Years: 2021 > From: current date > To Date: n/a > SUBMIT

View our screenshots below.

| JOHNSON FINANCIAL GROUP | Good After | rnoon, Kristy Migirditch 🔺 💿 🔅 🕒 |
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| A Dashboard EE Search Manage Plan | Improve My Outcomes Disclosures | Plan Selection 🗸 |
| Reports | | nint 🖷 |
| Acrobat Adaption Reader | | |
| Reports Generate Reports | | |
| Select report group Queries | | |
| Report Selection | Options | |
| Plan Balances by Fund | Divisions V | |
| Participants with Recurring Rebalances | Select employee | Balance Based On Trade Date |
| Participants with Recurring Distributions | | |
| | Select export file type | Available plan years |
| Ineligible Employees with Balances | Excel | 01/01/2021 - 12/31/2021 🗸 |
| | From | To date |
| Participants at Normal Retirement | 09/01/2021 | n/a |
| Plan Age and Service Analysis | | SUBMIT |
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Alignment 51 Number 51 Clipboard 🕠 Font 🖓 Styles \bullet : $\times \checkmark f_x$ D13 A B C D 1 As of date: 9/01/2021 G E F
 Z021
 Balance Amount
 Balance Units
 Plan Name

 VTHRX
 \$127,879.17
 2850.628000
 JFG Demonstration Plan

 VTHX
 \$257,977.02
 7977.028000
 JFG Demonstration Plan

 VTHX
 \$33,499.441
 1306.34000
 JFG Demonstration Plan

 VTHX
 \$33,499.441
 1306.34000
 JFG Demonstration Plan

 VTWNX
 \$203,299.431
 5499.038000
 JFG Demonstration Plan
2 Plan ID 3 JFGDEM0 4 JFGDEM0 Investment Name Division Vanguard Target Retirement 2030 Inv Vanguard Target Retirement 2045 Inv Default Default JFGDEMO Vanguard Target Retirement 2035 Inv Default VTWNX JFGDEMO Vanguard Target Retirement 2020 Inv Default

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