

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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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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 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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