



HOW TO ACCESS INTAC'S SECURE CLIENT AREA



I) Log on to the INTAC Website: www.intacinc.com

- Click on CLIENT LOGIN (top right of the page)
- To log in to the Client Portal: Enter Email, EIN # & Password*, then click Submit

Email: **Password:**

EIN # (ex. 12-3456789): -

[Forgot Password? Click Here](#)

*If this is your first time logging in, your password would be the phone number we have on file for you. You would then be prompted to change your password.

II) Enhanced Security

- Upon logging in you will receive a message regarding our enhanced security measures
- Please review this information and check "Please don't show this page again"

Security Notification

Introducing New Security Enhancements to INTAC's Client Portal

Thank you for using our Client Portal. We have recently added the following security enhancements to better secure your data and protect against unauthorized access to your account.

We are aware that these changes may add some complexity to the login process and we apologize in advance for any inconvenience that is caused. However we are confident you will appreciate and value these important enhancements that serve to protect your firm and your data, in an online world with ever-growing security threats.

If you experience any difficulty using our client portal please contact us at portal@intacinc.com.

- Limited Login Attempts** - You are now limited to only 6 login attempts within a 30 minute period. After six unsuccessful attempts your account will be locked. You will have the ability to unlock your account by answering your security questions and resetting your password.
- Two Factor Authentication** - You will now be required to enter a unique code every time you login from a new device or new internet browser. A code will be delivered to your email address which will enable you to access your account. After you successfully login, your device will be remembered and a code will not be required until your password gets changed.
- Password Duration Policy** - You will now be required to reset your password once every 6 months. This will ensure passwords are updated regularly and reduce the risk that your account is compromised.

Thank you for your continued confidence in INTAC. It is a privilege to be of service to you.

Please don't show this page again.

- You will then be required to enter a login code which you should receive via email, **If you do not receive an email please check your junk and clutter folders.**

Please enter token that was emailed to you.

Token:

- You may be asked to complete the following (only if you have not done so previously):
 - ✓ Change your password
 - ✓ Select and answer your security questions

III) Welcome to the INTAC Client Portal Home Page

Welcome Back John! Not you? Logout

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Home My Profile Filing Cabinet Invoices Annual Forms Contact Intac

Home >

Welcome, John Smith Not you? [Logout](#)

Welcome to the Intac Client Portal where you can interface with us, view important plan documents and provide the annual information needed to complete plan administration.

What would you like to do today?

- To view important plan documents, [click here](#)
- To submit annual information, [click here](#)
- Review and/or sign my Fee Schedule(s)

My Info
John Smith
Intac Actuarial Services, Inc.
545 Route 17 South
Ste 2001
Ridgewood NJ, 07450
Email: meir@intacinc.com
Phone: 201-447-2525
Fax: 201-447-9634

Service Agreements
NO YES Signed?
 [Service Fees Schedule - 401k Plan](#)

Plan Sponsor Info
Intac Actuarial Services, Inc.
545 Route 17 South
Ste 2001
Ridgewood NJ, 07450
Phone: 201-447-2525
[Click here to email Intac regarding any changes to My Info or Plan Sponsor Info](#)

- **My Profile** - You can view and edit your password, security questions and answers.
- **Filing Cabinet** - To view important plan documents, click the “Filing Cabinet” tab at the top of the page. Request viewing access for documents by contacting your INTAC Pension Consultant.
- **Invoices** - To pay outstanding invoices and view payment history.
- **Annual Forms** - To submit annual information, click the “Annual Forms” tab at the top of the page.

III) Filing Cabinet Tab - Click on links for easy access to important plan documents.

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Home My Profile Filing Cabinet Invoices Annual Forms Contact Intac

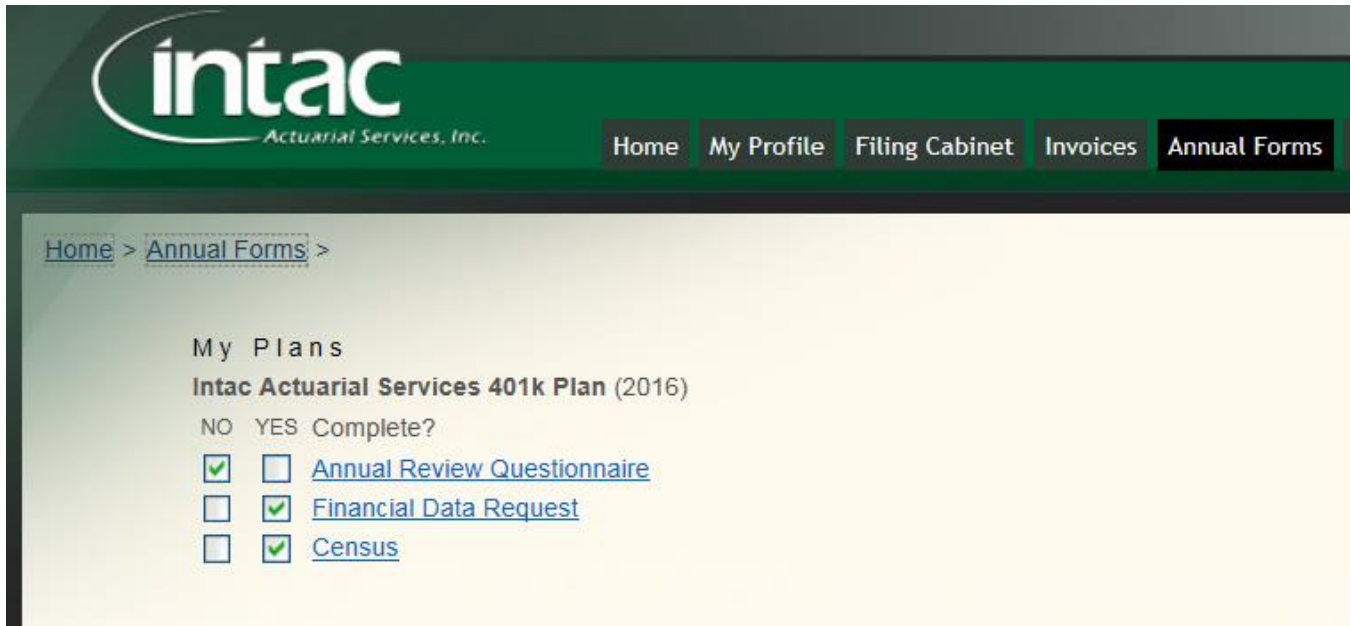
Home > [Filing Cabinet](#) >

Intac Actuarial Services 401k Plan

AGREEMENTS
[Ancillary Fee Schedule 7.17](#)

LEGAL DOCUMENTS
[2015 DC Interim Amendment](#)

IV) Annual Forms Tab - Click on the forms that are not complete to enter your year-end information.



- Under your plan name, click on the form you would like to complete. You have the ability to save as a draft until you are ready to submit your form.
- When you hit the Submit button on any form, your information will be sent to INTAC for review and you will receive a confirmation email.
- If you do not receive a confirmation email or if you need technical support please email portal@intacinc.com or contact our office and request technical assistance with the INTAC portal.
- A pension consultant will review the information and call you if there are any questions. If you have specific questions about your plan, feel free to contact our office and ask to speak with your pension consultant.

*** At any point, hit the Home tab to return back to the Client Portal Home Page.**