

Advisor Portal: Requesting Additional Plan Access

Do you have other client plans you'd like to access through the Advisor Portal?
Request access by following these steps.

Step 1: Log in to the advisor portal.

Log in

Step 2: Click "Request Plan Access."

Request Plan Access



My Plans

| Plan | Balance | Total Participants | Participation Rate | Contribution Rate | Loan Rate |
|---------------------------------------|----------------------|--------------------|--------------------|-------------------|-----------|
| 999003 ABC COMPANY 401K PLAN | \$155,709,544.07 ▲ | 2,177 ▲ | 76.4% ▲ | 0.8% ▼ | 30.7% ▲ |
| 999003 ACME & COMPANY RETIREMENT PLAN | \$1,855,767,768.48 ▲ | 800 ▲ | 99.0% ▲ | 90.0% ▲ | 39.2% ▲ |
| 999012 MYRETIREMENT DEMO PLAN | \$320,345,200.21 ▲ | 3,123 ▼ | 79.4% ▼ | 7.4% ▼ | 12.7% ▼ |
| 999003 MYRETIREMENT NO DEMO PLAN | \$4,934,407.04 ▲ | - | - | - | - |
| 999003 NON QUALIFIED PLAN | - | - | - | - | - |
| 999010 TECH MOD'S DEMO PLAN | \$234,987,354.43 ▲ | 4,421 ▲ | 84.4% ▼ | 8.0% ▲ | 22.7% ▲ |

[Request Plan Access](#)

Manage Your Profile & Preferences

Your Personal Information | Your Login Settings | **View Plan Access** | View Site Settings

Request Additional Plan Access

999994
There are no plans to select and submit. Cancel Submit

Currently Approved Plans

| PLAN NUMBER | PLAN NAME | CLIENT ID |
|-------------|--------------------------------|-----------|
| 999003 | ACME & COMPANY RETIREMENT PLAN | |
| 999012 | MYRETIREMENT DEMO PLAN | |
| 999010 | TECH MOD'S DEMO PLAN | |
| 999001 | TRP DEMO PLAN ONE | |
| 999994 | MYRETIREMENT NO DEMO PLAN | |
| 999008 | ABC COMPANY 401K PLAN | |

Step 3: Enter the plan number and click "Submit."

You will receive an email that your request has been submitted and additional emails once your request has been reviewed.

Request Additional Plan Access

999994
There are no plans to select and submit. Cancel Submit

Questions?

Contact your T. Rowe Price representative if you have any questions.