

ASSOCIATED BANK RETIREMENT ONLINE AUTOMATIC SAVINGS INCREASE (ASI)



The Automatic Savings Increase (ASI) feature is an optional feature that allows you to increase your contribution rate by a pre-determined percentage each year on June 1. This feature is available for both the Pre-tax Traditional 401(k) and Roth 401(k) contribution sources. Your retirement plan contributions will increase automatically. It's a built-in way to boost your retirement savings, and could get you closer to where you want to be at retirement.

To set up an Automatic Savings Increase, choose the **Account Transactions** tab and click **Deferral Changes** option from the drop-down menu. Check the **I wish to active Automatic Savings Increases** box to enable. Check **ASI Enabled** for either Traditional 401(k), Roth 401(k) or both.

- All ASI deferral changes occur annually on June 1.
 - o Example: You elect an ASI for Roth 401(k) with an increment level of 1% to an ASI Maximum of 10%. A 1% increase will occur on the following June 1 and will occur at that time each year until the ASI Maximum of 10% is met.
- If your ASI Maximum is below your current deferral percentage, the increase will not take place.
 - o Example: Your current Roth 401(k) deferral is 15%. You elect an ASI for Roth 401(k) with a maximum of 10%. Since 10% is below your current election of 15%, no increase will take place).
- If you elect an ASI for both Traditional 401(k) and Roth 401(k), both will increase until they meet the ASI Maximum for that particular 'source'.

I wish to activate Automatic Savings Increases

Source Name	ASI Enabled	ASI Increment	ASI Maximum
<i>i</i> TRADITIONAL 401(K)	<input type="checkbox"/>	0%	0%
<i>i</i> ROTH 401(K)	<input checked="" type="checkbox"/>	1%	10%
<i>i</i> Total			10%
Next Increment Increase Date	06/01/2019		

Click "Submit Deferral Change" once complete. You may turn off your ASI election at any time. For questions, please contact Associated Bank Retirement Help Line at 800-431-4649 (24/7).