

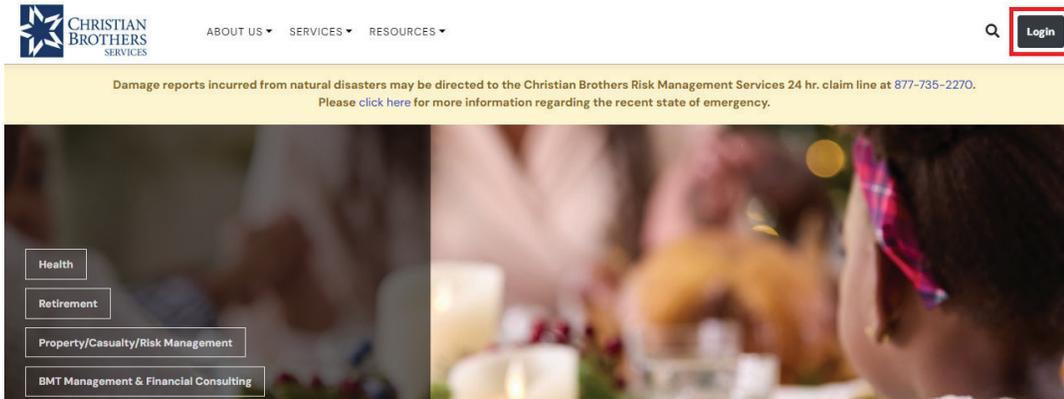


Christian Brothers Retirement Planning Services

Step-by-Step Instructions to access your accounts online

Let's get started! If you already have a Username and Password for the Participants | myCBS login, please follow steps 1, 2 and 3 below to access your benefits. Everyone else can start the registration process on **page 3**.

- 1 Go to: www.cbsservices.org and click the black **Login** box in the right-hand corner.



- 2 In the Account Login window, choose **Participants | myCBS** from the top data entry box, then enter your **Username** and **Password** and click **Login**. For assistance, click on **Forgot Username/Password?**

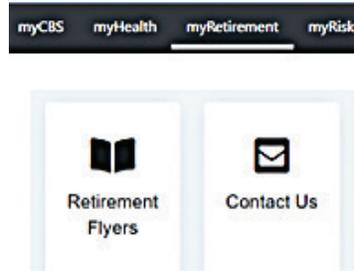


Click on the **My Retirement** link or click **myRetirement** on the toolbar and make your selection from there.



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- 3 In the myRetirement section, your account information and retirement resources are located under the **My Account** section in the left column. Retirement flyers and contact information are found in the center of the screen.

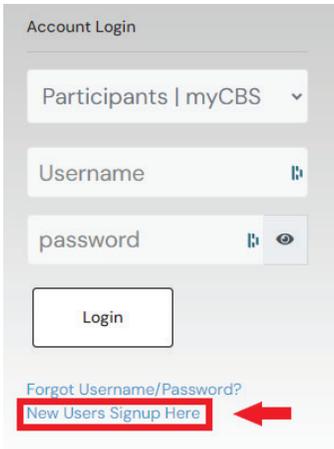
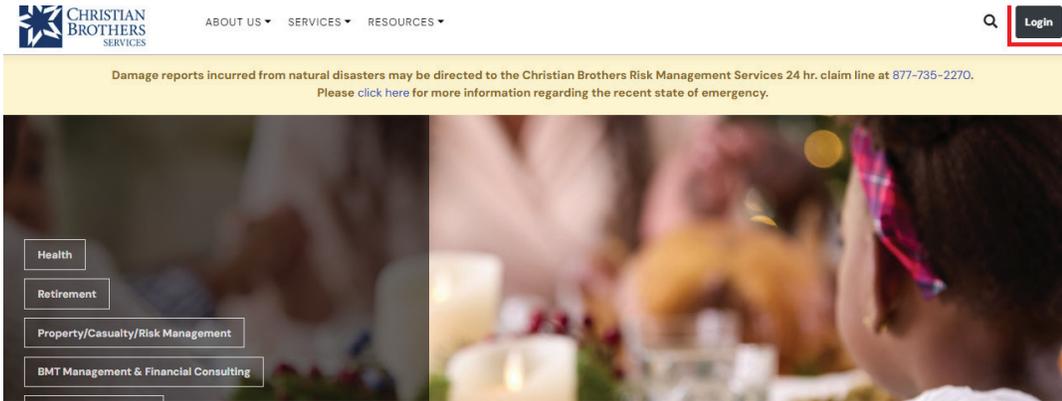




Step-by-Step Instructions to access your accounts online

New registrants start here.

1 Go to: www.cbsecurities.org and click the black **Login** box in the right-hand corner.



2 From the Administrator/Participant Login page, click on **New Users Signup Here.**

3 On the Registration page, click on **Register for Participants | myCBS.**

New User Registration

Participants | myCBS

Information for INDIVIDUALS enrolled in plans, programs, and resources all in one section.

- My Health Benefits
- My Retirement
- My Risk Service

Before you Register

This section provides access to individual participant accounts, such as EOB's and personal medical claims information for Health Benefit Services, and ERP balances, estimates, and beneficiary information for Retirement Planning Services. If you are looking for access to employer or organizations information, follow instructions for the Administrators Section.





Step-by-Step Instructions to access your accounts online

A. Select Access

Register Account and Select Access by clicking the **Retirement Planning Services** box. You can also select the **Health & Wellness** box, but only if your employer provides your health benefits through Christian Brothers Services.

Register Account

1 Select Access — 2 Verify Account — 3 Create Profile — 4 Verify Email

What are you registering for?

Health & Wellness

Retirement Planning Services

Continue

B. Verify Account

If you clicked on both Health & Wellness and Retirement Planning Services, you may click **Continue** and it will take you to this screen. Enter your **Identification Number** (ID#) and the **Primary Member's Date of Birth**. Then, select a button for the person you are verifying, either **Primary Member or Covered Spouse or Covered Dependent** (age 18+)." (Your ID card is required to complete this step.) Then click **Next**.

Verification

Health and Wellness

To activate your ID card please enter your ID# (numbers only) and date of birth below. If your ID# contains letters and numbers, only enter the numbers. (Your ID card is required to complete.) [How to find my ID number?](#)

Identification Number (ID#): *

Date of Birth: *

Profile Type: *

Primary Member

Covered Spouse

Covered Dependent (age 18+)

Back **Next**

If you clicked on Retirement Planning Services only, you will go here. Enter your **Social Security Number** (with or without dashes) and your **Date of Birth** in the format shown (mm/dd/yyyy). Then click **Next**.

Verification

Retirement Planning Services (ERP Account Participant)

401k/403b Account Participant: If you are a participant in either the 401k or 403b Plans, please proceed to [netbenefits.com](#)

SSN: *

Date of Birth: *

Back **Next**



Step-by-Step Instructions to access your accounts online

NOTE: If you selected Retirement Planning Services only, but you are also a participant in Health Benefit Services, you will see this screen. Click on “**register**” to register for both, click “**decline**” to only register for retirement.

Register Account

1 Select Access ————— 2 **Verify Account** ————— 3 Create Profile ————— 4 Verify Email

Additional Enrollment

You are a participant in the CBS Health & Wellness Plan.

This registration will also allow you to view your health account information.



Decline

Register

C. Create Profile

From either page, once you click **Next**, you will land on this next page asking you to enter your **Personal Information**, **Account Information**, and **Subscriptions** selection. Once complete, you may click **Save**.

Personal Information

Prefix:

-None- v

Religious Suffix:

First Name: *

Last Name: *

Email: *

Confirm Email: *

Alternate Email:

Confirm Alternate Email:



Step-by-Step Instructions to access your accounts online

Account Information

Username: *

Username requires at least 8 characters and 2 numbers.
Username can not be the same as your email address.

Password: *

Password must contain at least 8 characters and 2 numbers.
Password can not be the same as your username or email address.

Confirm Password: *

Security Question 1: *

Security Answer 1: *

Security Question 2: *

Security Answer 2: *

Subscriptions

- Risk Management Seminars
- Opt-Out of Emails for Value Added Services

Depending on whether you chose to verify for Retirement Planning Services only or for both Retirement and Health & Wellness, you will see one of these two screens:

Plans

Health Plan:

Retirement Plan:

- You are verified as a participant in the Christian Brothers Employee Retirement Plan.
- If you are a participant in either the 401k or 403b Plans, please proceed to netbenefits.com

Our retirement plan records show your address as:

[Back](#) [Save](#)

Plans

Health Plan:

- You are verified as a participant in the Christian Brothers Employee Benefit Trust.

Retirement Plan:

- You are verified as a participant in the Christian Brothers Employee Retirement Plan.
- If you are a participant in either the 401k or 403b Plans, please proceed to netbenefits.com

Our retirement plan records show your address as:

[Back](#) [Save](#)



Step-by-Step Instructions to access your accounts online

D. Verify Email

Once you click **Save**, you will get a new screen directing you to verify your email.

Verify Email

Next, you will receive a verification email (be sure to check your spam or junk folder).

Please click the verification link sent to your email address to activate your account.

Go to your email inbox, open the email, and **click on the link to verify your email**.

Thank you for registering with Christian Brothers. Please click on the link below to verify your email address and continue the registration process. This link is active 24 hours (Sat-Thur) or until 10:00pm (Fri).

[Click here to verify email](#)



Once you click on the link for email verification, you will get a new screen that contains a link to login. Registration is complete.

Email Verified

Thank you for verifying your email address. **Your registration is now complete.**

[Click here to login](#)

Should you have any questions or concerns, please contact us.
myRetirement: 1.800.807.0700