

Christian Brothers Retirement Planning Services

Accessing Your Retirement Account 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 pension benefits. Everyone else can start the registration process on page 2.

1 Go to: <u>www.cbservices.org</u> and select <u>Participant|myCBS</u> from the Account Login as shown below. For assistance, click on Forgot Username/Password?







Click the My Pension Benefits link found under My Account on the left side of the page. (If you do not see My Pension Benefits under My Account, please contact our office.)



Should you have questions or concern, please contact Mary Sebby at (630) 378.2638 or Elisa Pantaleo at (630) 378.2632 or if you prefer, email us at: rpscustomerservice@cbservices.org for assistance.

mycbs.org/retirement



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New registrants start here.

Step 1 of 2

A

1 Go to: <u>www.cbservices.org.</u> Under the "Login" drop down menu, select "New User Signup Here".



2 Click on Register for Participants	myCB
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Home / Registration			
About CBS	•	Registration	
Health	*	Participants myCBS	Administrators Section
Retirement	~	Information for individuals enrolled in plans Access plans, programs, and resources all in one section.	Employer and Organizational account management
Property/Casualty	~	My Health Benefits	Employee Benefit TrustReligious Medical Trust
BMT Management & Financial Consultants	*	My RetirementMy Risk Service	Risk Pooling Trust Student Accident Plan Patienerst
IT & Website Services	~	Register for Participants myCBS	Retirement
Catholic School Management	•		

3 Next, you will need to complete the myCBS registration form which will include 3 sections: Personal Information, Security Settings, and Retirement Planning Services

Personal Info	mation		
*First Name:		*Last Name:	
Prefix:	-None-	Religious Suffix:	
*Email:		*Email Confirm:	
Alternate Email:		Alternate Email Confirm:	

mycbs.org/retirement



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B Complete the Security Settings section by entering a username, password, and answers to BOTH security questions. Then select which CBS communications you would like to receive in the Subscription Selection section before proceeding.

t ules two numbers aracters long	- Cannot contain sp - Cannot contain yo	aces bur first name	- Cannot contain your last name - Cannnot be your email address
		*Password Confirm:	
Please select a quest	ion	• *Answer 1:	
Please select a quest	ion	• Answer 2:	
vsletter	HIPAA Privacy Po Online Privacy Po Risk Factor	licy C	Opt-Out of Emails for Value Added Services
	tules two numbers aracters long Please select a quest Please select a quest rsletter	tules two numbers - Cannot contain sp aracters long - Cannot contain yc	tules two numbers - Cannot contain spaces aracters long - Cannot contain your first name

C Click the Activate My Retirement Access button shown and enter the information requested. (Please note suggested format)

Retirement Planning Services			
401k/403b/ERP Account Participant:	Activate My Retirement Access		
	,		

You must enter your Social Security Number (with or without spaces) and Date of Birth (using the format provided). When finished, please click the Verify button.

To activate your account for the My F Number.	Retirement section, you m	ust provide your Social Security
S Date Of B Cancel	SN:	(With or without spaces) (Must be in mm/dd/yyyy format)

The Process is NOT complete until you finish step #2 continued on the next page.



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Registering for Access to Your Retirement

Step 2 of 2

The registration process is a 2-step process. It is not complete until you have completed step 2. By now you should have completed the three sections (Personal Information / Security Settings / Retirement Planning Services) After you have clicked the Verify button, the following message will appear at the top of the page:

Email Verification

You will need to click the verification link in the email sent to you at the email address entered below in order to continue this process. If you do not receive the email please check your spam or junk email boxes. If the email below is inaccurate, you will need to create a new profile using the correct email address.

5 Check the inbox of the email address you used to register your account. The email will be from Membercare and the subject will be Email Verification. The link is active for 24 hours (Saturday – Thursday) or until 10:00 PM (CST) Friday. When you click the link in the email that says Click here to verify email you will be taken to a screen that confirms that your email has been verified. If you Click here to login you will be taken back to the home screen.



6 At this point you are registered for access to your retirement account. (You may need to log back in.) Once you are logged in, click My Retirement then click My Pension Benefits under My Account on the left side of the page. (If you do not see My Pension Benefits under My Account, please contact our office.)



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