

1. You will receive an invitation from Human Interest to your email
2. Inside email press the button to Set up your account with user name and password
3. Log in to your account, make a selection and press next Button.

The screenshot shows a form titled "Your Information" with a progress indicator at the top showing step 1 of 5. The form contains the following fields:

- Name: (empty)
- W: (empty) it recommendations.
- Birth Date: **January 8, 1990**
- Marital Status: **Single** (dropdown menu)
- Gender: **Not Specified** (dropdown menu)

At the bottom left, there is a logo for "Horton" and a link "About Our Security Practices". At the bottom right, there is a dark blue "Next" button. Two black arrows point to the "Single" dropdown menu and the "Next" button.

Fill the form, press "Next"

The screenshot shows a form titled "401(k) Account Setup" with the subtitle "Easily set up your Human Interest 401(k) account." The form contains the following fields:

- Contact Information: We pre-filled some information below based on your company's records. Email support@humaninterest.com to request corrections.
- Email: **belhallen52@aol.com**
- Address: (empty)
- Address (Line 2): **Optional**
- City: **Brooklyn**
- State: **New York** (dropdown menu)
- Zip: **11234**

At the bottom left, there is a "Back" button. At the bottom right, there is a dark blue "Next" button. A black arrow points to the "Next" button.

Press "No" button

Put 0 in box with %

Press Next

Your Contribution

Contributing a portion of your paycheck to your 401(k) will help build savings for your future retirement. In addition, your employer may make a contribution, aka an employer match.

Select Your Contribution Rate

Review your 401(k) type and contribute what you can for your future retirement.

Have you contributed to another company's 401(k) or 403(b) this year (2025)?

We'll help calculate how much more you can contribute to your 401(k) this year, and let you know when you approach or exceed the annual IRS limit. [Learn More](#)

No Yes

Review 401(k) type and contribution rate

Some experts recommend saving 10-15% of your paycheck. The annual IRS limit for 2025 is \$23,500.00.

Once submitted, your contribution rate will be applied across to all employers in the plan where you receive a paycheck.

401(k) Type ⓘ

Traditional Roth Both

% \$

Contribution Per Pay Period

0 %

You'll contribute an estimated \$0.00 per pay period to your 401(k) ⓘ

LOW

ⓘ This contribution may be too low. We recommend at least 3%.

Back Next

Click on "Off" option

Press "Next" button

The screenshot shows a web interface for reviewing an investment portfolio. At the top, a progress indicator shows four steps, with the fourth step (a circle with the number 4) highlighted. Below this, the heading "Investment Portfolio" is followed by a sub-heading "Review Your Recommended Portfolio". A paragraph explains that the automated advice is designed to diversify the portfolio across multiple asset classes and rebalance quarterly. The recommended portfolio is displayed as a donut chart with the following breakdown: 47% U.S. Equity, 31% International Equity, 9% Sector Equity, and 13% Taxable Bond. A legend to the right of the chart lists the corresponding fund tickers: VTSAX for U.S. Equity, VTIAAX for International Equity, VOSLX for Sector Equity, and VBTIX and VTABX for Taxable Bond. Below the chart is a slider for adjusting the portfolio's risk level, ranging from "More Conservative" to "More Aggressive". Underneath the slider is a section for "Automatic Portfolio Adjustment" with two radio buttons: "On" and "Off". The "Off" button is selected, and an arrow points to it from the text "Click on 'Off' option" above. At the bottom of the screen, there are "Back" and "Next" buttons. An arrow points to the "Next" button from the text "Press 'Next' button" above.

Investment Portfolio

Our automated investment advice is designed to diversify your portfolio across multiple asset classes, rebalance quarterly and adjust to become more conservative as you age.

Review Your Recommended Portfolio

Review your recommended portfolio, select another one of our model portfolios, or build a custom portfolio if you want to choose funds yourself.

47% U.S. Equity / 31% International Equity / 9% Sector Equity / 13% Taxable Bond

is recommended based on your age and time to retirement at 67

[Fine-Tune Your Recommendation](#)

47% U.S. Equity
31% International Equity
9% Sector Equity
13% Taxable Bond

Target Breakdown

- 47% U.S. Equity [VTSAX](#)
- 31% International Equity [VTIAAX](#)
- 9% Sector Equity [VOSLX](#)
- 13% Taxable Bond [VBTIX](#), [VTABX](#)

Within our recommendations for your age and time until retirement at 67

More Conservative More Aggressive

Automatic Portfolio Adjustment

On Off

Have a concern? We will NOT automatically adjust your portfolio to be more conservative as you get closer to retirement.

[Build a Custom Portfolio](#)

Back Next

Press "I agree" box and then press "Confirm" button

Welcome, [Name]

5

Review and Confirm

Your Contribution [EdR](#)

Contribution Type: **Traditional 401(k)**

Traditional Contribution Per Pay Period: **0%** (\$0.00)

Investment Portfolio [EdR](#)

Your Target Portfolio

47% U.S. Equity
31% International Equity
9% Sector Equity
13% Taxable Bond

Target Breakdown

- 47% U.S. Equity [VTSAX](#)
- 31% International Equity [VTIAX](#)
- 9% Sector Equity [VGSIX](#)
- 13% Taxable Bond [VTTLX](#), [VTABX](#)

[About Our Investment Philosophy](#)

Acknowledgements

I agree to and acknowledge receipt of the [Terms of Use](#), [Privacy Policy](#), [Form ADV Part 2A](#), [Form ADV Part 2B](#), [CRS](#), and [Investment Advisory Agreement](#).

[Back](#) [Confirm](#)

This portion is done.

To request your money back:
Click on "Rollovers and Withdrawals" tab

Overview History **Rollovers & Withdrawals** Loans Support



You were auto-enrolled in this plan

Great news! You're saving for retirement thanks to your employer's auto-enrollment settings. Your funds will remain in your account and potentially grow over time. You can adjust your contribution rate at any time or set to 0% to pause contributions.

[Learn More](#)

Guidance & Productivity Staffing Solutions Services, LLC 401(k) Plan

Total Balance ⓘ

\$ [REDACTED]

as of 06/19/2025

Performance [View More](#)

\$9.17

Change in Value

Reflects the inception to date change in market value of your portfolio. Includes interest and dividends, and the deduction of fees.

6.59%

Personal Rate of Return ⓘ

Reflects an inception to date return presented net of investment advisory fees and includes the reinvestment of dividends, interest and other earnings.

Contributions [Update](#)

0% Traditional (Pre-tax)

0% Roth (After-tax)

\$ [REDACTED]
2025 Contribution

LOW

⚠ This contribution may be too low. We recommend at least 3%.

Portfolio [View More](#)



Current Breakdown ⓘ

- 47% U.S. Equity [VTSAX](#)
- 31% International Equity [VTIAX](#)
- 9% Sector Equity [VGSIX](#)
- 13% Taxable Bond [VTTLX, VTABX](#)

Target Portfolio

- 47% U.S. Equity
- 31% International Equity
- 9% Sector Equity
- 13% Taxable Bond

Press "Get Started" button on top right corner



You are eligible to take a withdrawal

You have **16 days** left to opt out of your plan and request a withdrawal. Your plan allows you to withdraw automatic contributions, including earnings, within this time frame.

[Get Started](#)

Rollovers & Withdrawals

[New Requests](#) [Request Activity](#)

Move money into your account



CONSOLIDATE ACCOUNTS

Rollover to your Human Interest account

Rollover your current 401(k), 403(b), IRA, or other qualified retirement account to your Human Interest account.

[Get Started](#)

Move money out of your account



Rollover to a new account

You're not currently eligible to rollover to a new account. The most common reason for being ineligible is that you're still employed. If you're no longer employed, please contact your plan administrator to update your record in their payroll system.

[Not Eligible](#)



Cash out all

You're not currently eligible to cash out your account. The most common reasons for being ineligible are that you're still employed or below the minimum age for withdrawals allowed by your plan. If you're no longer employed, please contact your plan administrator to update your record in their payroll system.

[Not Eligible](#)



[Experiencing hardship? See if you qualify.](#) [Get Started](#)



[Looking for a different type of distribution? Explore your options.](#) [Learn more](#)

Not sure which distribution type is right for you? Read our [Special Tax Notice](#) or consult a qualified advisor.

Press "Continue" button
Enter your password again

Sign In to Continue

This update requires you to re-enter your password for security purposes.

Password

Sign In

Back

Press Confirm details

1

Confirm profile details

GUIDANCE & PRODUCTIVITY STAFFING SOLUTIONS SERVICES, LLC

Account ID

Need to make changes?

Please visit your profile to update information. [Edit My Profile](#)

Your information

Name

Date of Birth

Contact information

Email

Phone Number

Backup Email

Address

None designated

Not sure which distribution type is right for you? Read our [Special Tax Notice](#) or consult a qualified advisor.

Cancel

Next: Withdrawal details



Press withdrawal details

Make sure that Federal Taxes are set to 0

Withdrawal details GUIDANCE & PRODUCTIVITY STAFFING SOLUTIONS SERVICES, LLC

Account ID

Account Balance

Withdrawal summary

Requested

Transaction Fee **FREE**

Estimated Total ⓘ

Applicable Taxes:

State Taxes

I would like to opt out of State taxes

If you have too little tax withheld, you will generally owe tax when you file your tax return and may owe a penalty unless you make timely payments of estimated tax.

Federal Taxes

For an eligible distribution, the default withholding rate is 10%. You can choose a rate greater than 10% by entering the rate below. Select 0% if you'd like to waive taxes withholding.

Enter the amount below if you would like a rate of withholding that is different from the default withholding rate. You may also use this link to [calculate your tax bracket](#).

Federal Taxes (Required)

%

The link below will take you to the 2024 Marginal Rate Tables form. You may use these tables to help you select the appropriate withholding rate for this payment or distribution. Instructions on how to best use them are included.

[Reference the Marginal Rate Tables on this form](#)

Not sure which distribution type is right for you? Read our [Special Tax Notice](#) or consult a qualified advisor.

Back **Next: Payment details**

Choose the second option for receiving money by mail

GUIDANCE & PRODUCTIVITY STAFFING SOLUTIONS SERVICES, LLC

Payment details

QuickDeposit™ Fast and free bank transfer

Link your personal checking or savings account to receive your 401(k) withdrawal via QuickDeposit™. We use Plaid to securely connect to your bank and process a fast, free ACH transfer.

[Link for Deposit](#)

Note: Only a personal checking or savings account with your name "Allen Belhomme" will work for a direct deposit. This account will only be used once to transfer your funds about 2-3 days after submission of this request. If we are unable to complete the transfer to your account, we will send a check to the address on file at no cost to you.

All delivery method options ^

- QuickDeposit™ FREE
Receive your funds via direct deposit in **2-3 business days**
- Check via FedEx ~~at a cost of \$125 per check~~ **WAIVED**
Receive your funds via check in the mail in **7-10 business days**

Check will be sent to:

Send to

Shipping

Via Standard Shipping
7-10 business days

If you need to make address changes, [visit your profile](#) before continuing.

Not sure which distribution type is right for you? Read our [Special Tax Notice](#) or consult a qualified advisor.

Account ID

Withdrawal summary

Requested

Shipping & Handling	WAIVED
Transaction Fee	FREE
Estimated Total	

[Back](#) [Next: Review & submit](#)

Check all boxes and press "Submit Withdrawal"

Review & submit GUIDANCE & PRODUCTIVITY STAFFING SOLUTIONS SERVICES, LLC **Account ID**

Information on check:

Pay to the order of Dollars

\$

Estimated total ⓘ

Check will be sent to:

Address **FREE**

Via Standard Shipping

7-10 Business Days

Not sure which distribution type is right for you? Read our [Special Tax Notice](#) or consult a qualified advisor.

Participant certification

- I certify that the information provided on this form and any attached forms is accurate and complete to the best of my knowledge. I authorize representatives of my plan to verify any or all the information submitted.
- I have read and understand the instructions for this form, including the [Special Tax Notice](#), and understand that applicable federal tax withholding will be made, mandatory state withholding may apply, and I am agreeing to waive the 30-day waiting period to allow distributions to process as soon as possible.
- I understand I have opted to edit my tax withholding and understand if I have too little tax withheld, I will generally owe tax when I file my tax return and may owe a penalty unless I make timely payments of estimated tax and that if too much tax is withheld, I will generally be due a refund when I file my tax return.

Back **Submit withdrawal**

Final Screen

[New Requests](#) **Request Activity** ⓘ

 **PROCESSING**
Auto-enrollment withdrawal
Requested on 05/20/2025

ACCOUNT ID 61011
\$
Estimated cash out total

What to expect:
It can take us up to 10 business days to process your withdrawal request, and up to 10 business days to mail your check. We'll let you know when the funds have been traded and when your check is on the way.


 **Request submitted**
05/20/2025

 **Request processed**
7-10 business days from submission

 **Check mailed**
7-10 business days from processing

Information on check:

Pay to the order of _____ Dollars

\$
Estimated total ⓘ

Early withdrawal penalty: The IRS assesses a 10% early withdrawal tax for most distributions made before age 59½. You're also responsible for applicable income taxes. If eligible, consider a rollover of your funds.

Mailed To:

Address _____

FREE
Via Standard Shipping
7-10 Business Days

Need to make changes? Please contact support@humaninterest.com or call (855) 622-7824 as soon as possible.

Human Interest's investment advisory services are provided for a fee by Human Interest Advisors LLC ("HIA"), a subsidiary of Human Interest, Inc. HIA is registered with the Securities and Exchange Commission (SEC). SEC registration does not imply a certain level of skill or training. Investing involves risk and may result in loss. Past performance is no guarantee of future results. Please review the firm's [ADV 2A brochure](#) for additional information.

Human Interest does not provide tax, legal or accounting advice. Your use of this website is governed by Human Interest's [Terms of Use](#). This site is protected by reCAPTCHA and the Google [Privacy Policy](#) and [Terms of Service](#) apply.

© Human Interest