Moneymax 401(k) New User Guide

Welcome to the Financial Psychology 401K New User Guide.
This is a guide to help you utilize the Moneymax 401(k) Program.

Creating Moneymax 401(k) Accounts:

You may create an account with any number of profiles for any specific company.

After logging into www.financialpsychology.com click on the My Account Button in the Member Services Area. From here, click the Moneymax 401K Manager Tab at the top of the page.

- ❖ Click the Add Profiles Button
- ❖ Follow the on-screen instructions and click Assign Profiles

Managing Your Moneymax 401(k) Accounts:

After assigning company profiles, you may view a detail of each company.

- ❖ Click View
- ❖ From here, click View Profile to generate a company's 401(k) report.
- ❖ It may take up to 60 seconds to generate a report.
- ❖ You may also view Aggregate Trait and Aggregate Group Distribution Reports, comparing a company's individual profiles.

You may add/delete profiles to any given company.

Enabling Your Clients to Access the 401(k) Client Side Site:

Your participants may access the 401K client web site
using the following parameters:

URL: http://401k.financialpsychology.com

Once in this web site, your client will need to enter his/her Company Code, which you have created when you added Profiles to the account, in order to begin.