

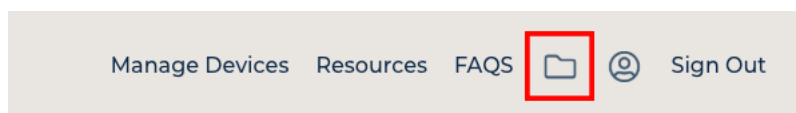
To access and download historical information, log in to InfoExpress at login.alerus.com and click on the relevant account under the "Select Plan" menu.

There are three types of historical information:

- Quarterly account statements
- Activity history
- Contributions and transactions

Download Quarterly Statements

To download your quarterly account statements, click on the folder icon at the top right of the screen (near the "Sign Out" link).

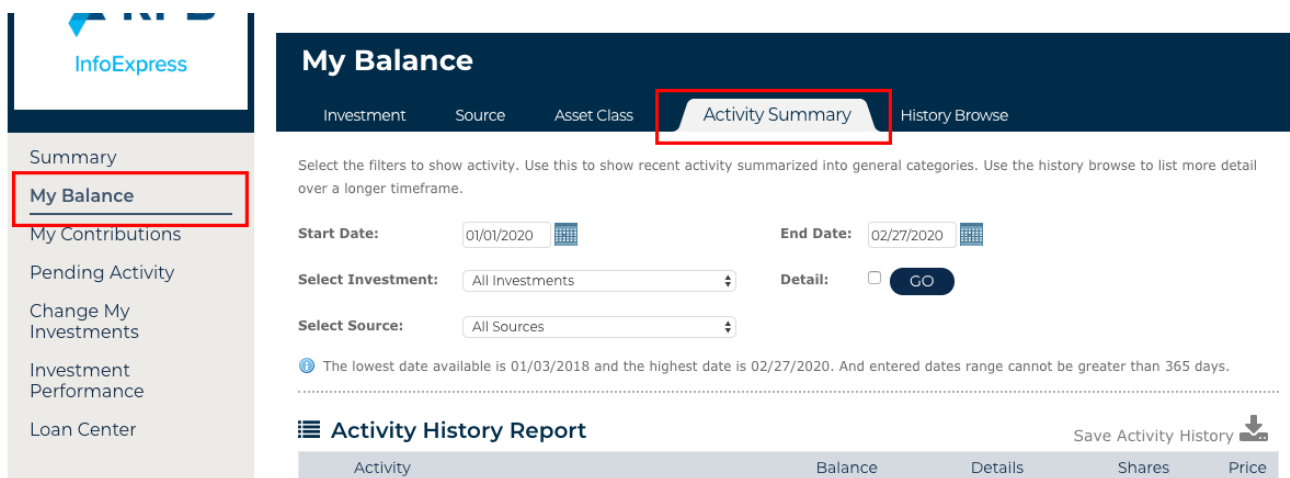


- Select "statements" from the dropdown menu.
- Select the relevant date range.
- Click "Go."

You can then download those statements going back multiple years.

Download Activity History

To download a history of the holdings and balance of your account, click on the "My Balance" link on the sidebar, then select the "Activity Summary" tab.



InfoExpress

My Balance

Investment Source Asset Class Activity Summary History Browse


Select the filters to show activity. Use this to show recent activity summarized into general categories. Use the history browse to list more detail over a longer timeframe.

Start Date: 01/01/2020 End Date: 02/27/2020

Select Investment: All Investments Detail: GO

Select Source: All Sources

i The lowest date available is 01/03/2018 and the highest date is 02/27/2020. And entered dates range cannot be greater than 365 days.

Activity History Report Save Activity History 

Activity	Balance	Details	Shares	Price
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- Enter the date range and select “Investment” or “Source” from the drop-down menus. Check the “Detail” box to also see account history by fund.
- Click “Go” to display your Activity History Report.
- Click on the “+” to view more transaction details, including contribution information.
- Click on “Save Activity History” to download the history report to a CSV file in Excel. You can also click on the Quicken Download icon on the left side of the screen to import your activity to Quicken.

Download Contribution and Trades

Click on the "My Balance" link on the sidebar, then select the "History Browse" tab.

This page lists all activity from January 1, 2016 onward.

- Select the relevant dates.
- Click "Go" to see every contribution, earning, fee, transfer, and any other transaction within the selected dates.
- Click “Save History” to download a CSV file of all of your data.