

Account Access

Ameritas Retirement Plans



As a participant in your company's retirement plan, Ameritas provides you with secure online and telephone access to your retirement plan account 24/7. Refer to the following information to help you start taking advantage of these resources today!

Online account access

To login, click on "Sign In" in the upper right-hand corner of ameritas.com.

Select Retirement Plans, then the Customer (Plan Participant)

Login option. Enter your User ID

and Password and follow any prompts. Then click "View Account" for your Retirement Plan to access your account. (Note: First-time users will need their certificate number and will be required to provide an email address or telephone number for authentication. You can obtain your certificate number from your welcome letter, employer or by calling participant services at 800-277-9739.)



The screenshot shows the Ameritas Retirement Plans Overview page. At the top, it displays the date (07/23/2018), a banner for "SmartPlan Version... Get the Most from Your Statement", and a user profile for "Seraphina Smith". The main content area features a "MY PAST" section with a sunset image and a "MY PRESENT" section with a mountain image. The "MY PRESENT" section shows an account balance of \$428,561.27 as of 01/31/20. Below these are sections for "What is my balance?", "How much am I saving?", and "Will I Have Enough?". The bottom of the page includes links for "Let SmartPlan Guide You", "Your Future Investments", "Your Statements & Confirmations", "Loans", and "Withdrawals". The footer contains copyright information and links to "Legal Statement", "Terms of Use", "Privacy Policy", and "Usage Guidelines".

Overview page

Once logged in, you'll have instant access to your latest rate of return, account balance and contribution rate from your Overview page. You'll also have access to manage your investments, historical information, account activity, plan documents, educational resources and more with this easy-to-navigate site.*

*Not all features are available for all plans.

If you have any questions about the website or using the available features, please contact participant services at 800-277-9739.

Telephone account access

Our automated voice response system is available to provide your account balance, balance by investment, outstanding loan balances, and month-to-date and year-to-date investment performance 24/7. Please note that online account access provides features not available through the automated telephone response system.

First-time Users

Dial 800-277-9739, option 1, and follow the prompts:

1. Input your Social Security number.
2. Input your temporary PIN which is the last four digits of your Social Security number.
3. Create a new PIN to use going forward.
4. Select your options.

Current Users

Dial 800-277-9739, option 1, follow the prompts to enter your Social Security number and PIN, then select your options.



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