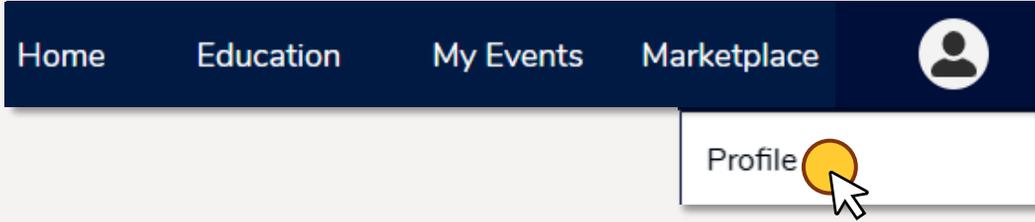


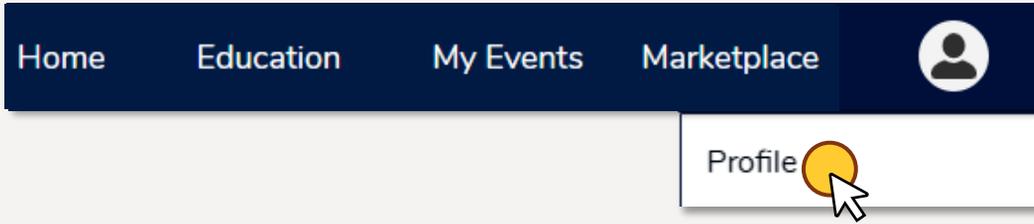
Navigating My Profile



- 1 After hovering on the My Profile Icon, when selecting **Profile** from the dropdown menu, you will be able to edit Name & Company, Contact information, demographics, review Orders & Invoices, view current and past memberships, and view a list of saved payment methods.
- 2 When selecting **Name & Company** you will be able to view general information about your account. When clicking the **Edit** button, you will be able to update your Name, Salutation, add or edit a Nickname, add or edit your Title.



Navigating My Profile



3 When selecting **Contact Information**, you will be able to update your **Email Preferences, Mailing Address** for Home & Business, and **Phone** information.

Name & Company

Contact Information

Demographics

Orders & Invoices

Membership & Subscriptions

Payment Methods

Email

Username Email

* Preferred Email Type for ARA Marketing
Personal

* Personal Email

Work Email
you@example.com

Save

Address

Business Street <input type="text"/>	Home Street <input type="text"/>
Business City <input type="text"/>	Home City <input type="text"/>
Business State/Province Code <input type="text"/>	Home State/Province Code --None--
Business Country Code United States	Home Country Code United States
Business Zip/Postal Code <input type="text"/>	Home Zip/Postal Code <input type="text"/>

Save

Phone

* Work Phone

Mobile Phone

* Preferred Phone Type
Work

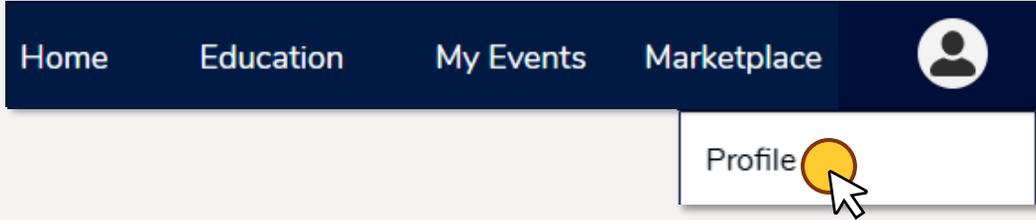
Work Do Not Call Mobile Do Not Call

Save

 **Pro tip**

Be sure to select **Save** in each section after you make a change to ensure it is updated in the system.

Navigating My Profile



- 4 When selecting **Demographics**, you will be able to update your **Primary ARA Organization Affiliation** (*Important: this is not a membership function. Changing this setting will only change the color schemes on your account page, as well as the logos and graphics in your order confirmations and invoices*), **Employer Type, BD, RIA, Job Function, If you are a business owner or not, Years in Industry, Birth Year, Gender, and Race.**

Name & Company

Contact Information

Demographics

Orders & Invoices

Membership & Subscriptions

Payment Methods

Demographics

Primary ARA Organization Affiliation

Member ID

Type of Employer/Business ⓘ

Broker Dealer

RIA

Job Function

Business Owner

Year Started in Retirement Industry

Year Born

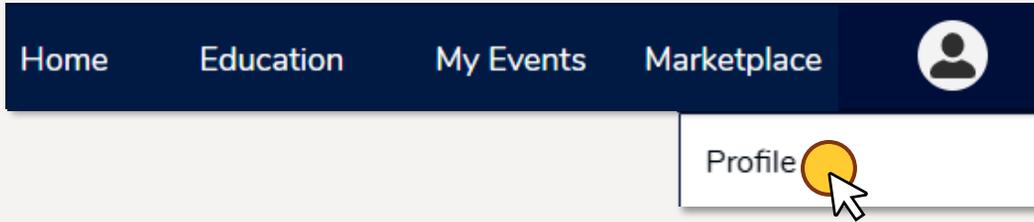
Gender

Race/Ethnic Identity

 **Pro tips**

- These demographics are optional
- Select **Save** after editing this screen to ensure your account is updated.

Navigating My Profile



- 5 When selecting **Orders & Invoices** you will be able to view open balances or past due amounts at a glance. **Important:** your default view is to see open orders. To look at a previous order or paid orders, you must select **All Orders**. In this new view you will be able to **Search** for a specific Invoice number or by a specific **Date Range**.

Orders, Invoices & Receipts
You can view all of your current and previous orders, receipts and invoices below.

Click on Open Orders or All Orders.

To view an invoice, receipt, or pay for an order, click the check box next to the order number and select the following options:

- View your Order / Receipt / Invoice
- Download your Order / Receipt / Invoice
- Pay your Order / Invoice

You can use the search function and date range to help find specific orders.

Note: When you download a receipt or invoice, it will open a PDF in a new tab in your internet browser. Follow your browser's method for printing or saving the PDF.

Past Due
Total Balance Due
\$0.00

Upcoming Order #:
Total Balance Due
\$0.00

Open Orders
Total Balance Due
\$0.00

Open Orders All Orders

Search Date Range

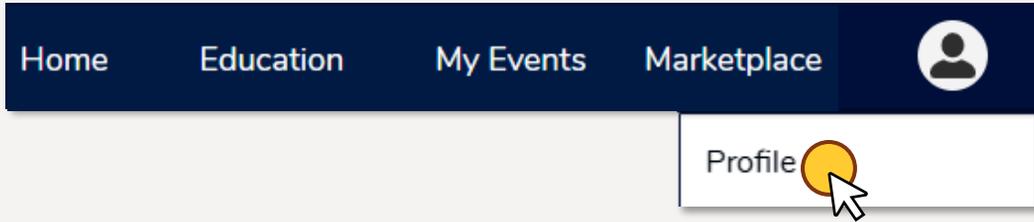
Orders found: 0

<input type="checkbox"/> Order/Invoice #	Items	Due Date ↑	Balance Due	
<input type="checkbox"/> 002205641	2026 NTSA Summit	03/05/2026	\$0.00	>
<input type="checkbox"/> 002205638	ASPPA Plan Consultant Magazine Spring 2024 - ...	03/05/2026	\$0.00	>

Pro tips

- When downloading invoices/receipts PDFs will open in a new browser tab.
- See the highlighted area above for quick view or download access to specific orders.

Navigating My Profile



- 6 When selecting **Membership & Subscriptions** you will see an At-A-Glance view of all membership and subscription **Start Dates, End Dates, Activate Dates, and Paid Through Dates**. The screen is split to show current (Active) items on the top and old (Past) items on the bottom.

Name & Company

Contact Information

Demographics

Orders & Invoices

Membership & Subscriptions

Payment Methods

Active Memberships & Subscriptions

	Item Name	Paid By	Term Start Date	Term End Date	Activated Date	Paid Through Date
1	ASPPA Membership	SELF	Mar 5, 2026	Dec 31, 2026	Mar 5, 2026	Dec 31, 2026

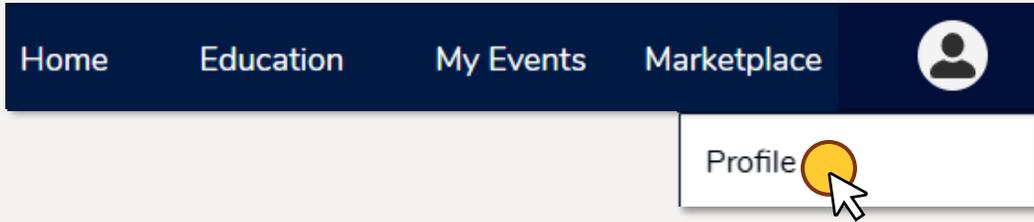
Past Memberships & Subscriptions

Nothing to show

 **Pro tips**

- If you have education purchased for you, this screen will help you see if a specific membership is paid by SELF or another party or your company.
- **This menu option is for information only.**

Navigating My Profile



- 7 When selecting **Payment Methods** you will see an At-A-Glance view of all credit cards chosen to be saved when purchasing an item in the eStore. **Important Note:** this menu option is for information only; you can only remove a saved card by using the trash can icon. If you delete a card from this screen, it will not be available in future eStore purchases.

Name & Company	Credit Cards																		
Contact Information	Below are the saved credit cards we have on file. You can add or delete your saved credit cards when you make a purchase in our E-store.																		
Demographics	<table><thead><tr><th>Card Type</th><th>Ending In</th><th>Expiration</th><th>Full Name</th><th>Billing Address</th><th></th></tr></thead><tbody><tr><td>Visa</td><td>1111</td><td>04/26</td><td>Card holder name</td><td></td><td> </td></tr><tr><td>Visa</td><td>1111</td><td>05/37</td><td>Card holder name</td><td></td><td> </td></tr></tbody></table>	Card Type	Ending In	Expiration	Full Name	Billing Address		Visa	1111	04/26	Card holder name			Visa	1111	05/37	Card holder name		
Card Type	Ending In	Expiration	Full Name	Billing Address															
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Visa	1111	05/37	Card holder name																
Orders & Invoices																			
Membership & Subscriptions																			
Payment Methods																			