

This document provides instructions for whitelisting the Pension Planning Consultants (PPC) domain (@pensionplanningusa.com) for both **Gmail** and **Outlook**. If you are using other providers, search for “How to whitelist a domain”.

Whitelisting the Pension Planning Consultants (PPC) domain will ensure that any email messages sent from PPC will be delivered to your Inbox and avoid being moved to your Spam or Junk folders.

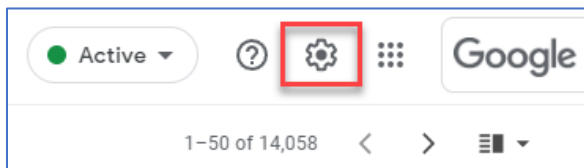
This process can be applied to both desktop and mobile phone applications.

Gmail Accounts

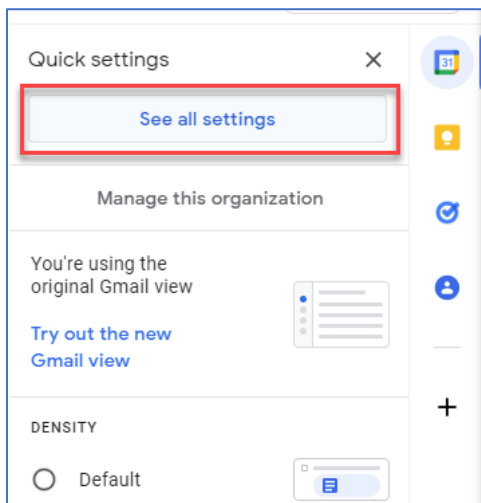
Whitelist @pensionplanningusa.com for Gmail Accounts

Here are the steps to take to whitelist the PPC Domain for your Gmail account.

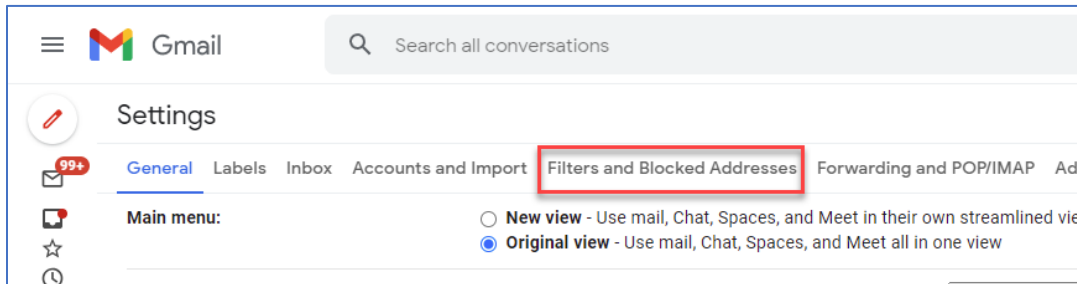
1. Login to Gmail account
2. Click on the **Settings Icon**



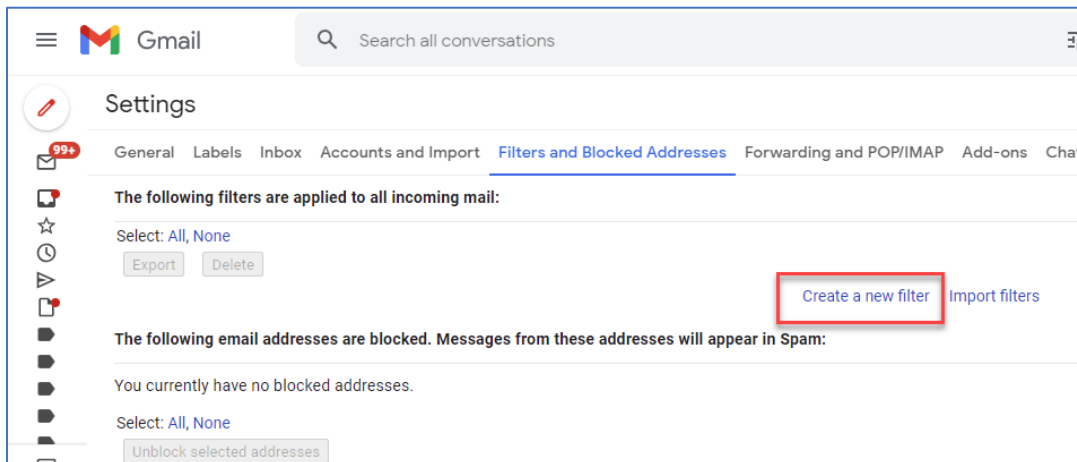
3. Select **See all settings**



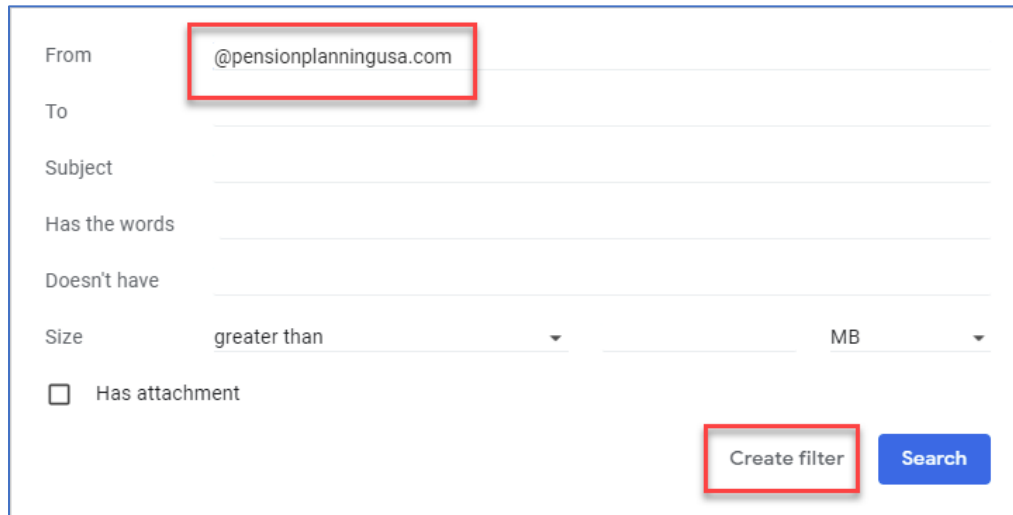
4. Select **Filters and Blocked Addresses** from the top menu.



5. Click on the option to **Create a new filter**

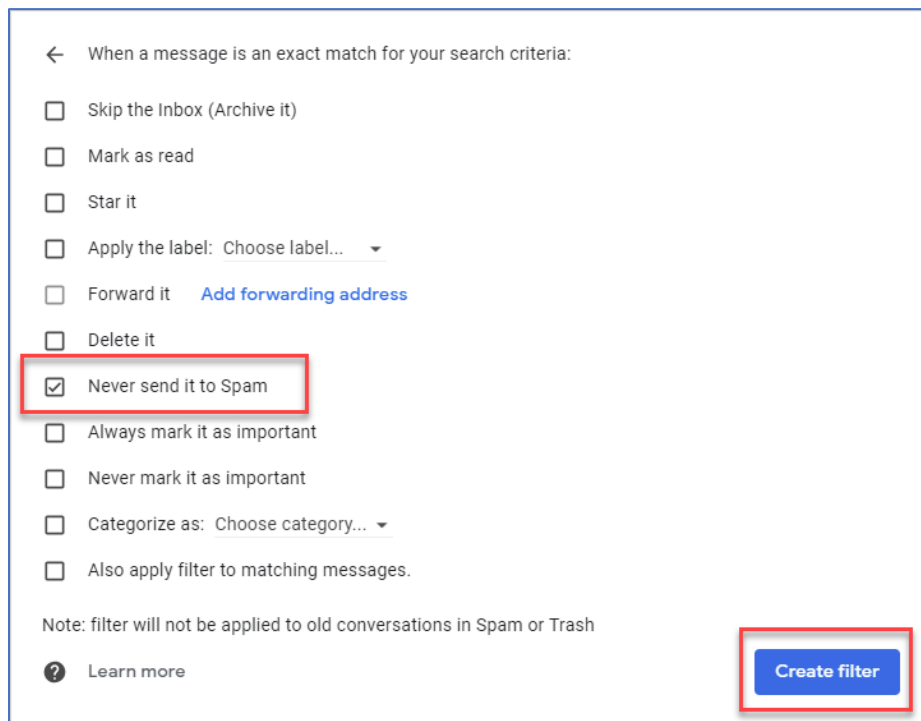


6. In the **From** section, enter **@pensionplanningusa.com**. Click on **Create Filter**



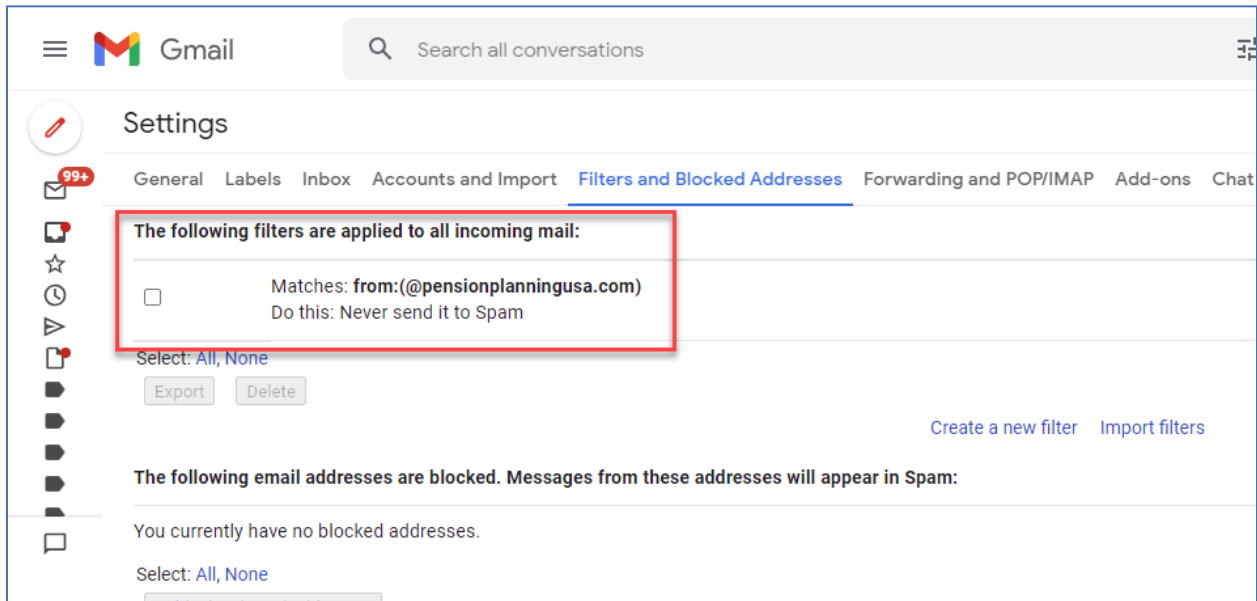
A screenshot of the Gmail filter creation interface. The 'From' field is populated with '@pensionplanningusa.com' and is highlighted with a red box. Below the 'From' field are fields for 'To', 'Subject', 'Has the words', and 'Doesn't have'. The 'Size' field is set to 'greater than' and 'MB'. There is a checkbox for 'Has attachment'. At the bottom right, there are two buttons: 'Create filter' (highlighted with a red box) and 'Search'.

7. On the next screen, check the box next to **Never send it to Spam**. Click on **Create filter**.



A screenshot of the Gmail filter creation actions screen. The heading is '← When a message is an exact match for your search criteria:'. There is a list of actions with checkboxes: 'Skip the Inbox (Archive it)', 'Mark as read', 'Star it', 'Apply the label: Choose label...', 'Forward it [Add forwarding address](#)', 'Delete it', 'Never send it to Spam' (checked and highlighted with a red box), 'Always mark it as important', 'Never mark it as important', 'Categorize as: Choose category...', and 'Also apply filter to matching messages.'. A note at the bottom states 'Note: filter will not be applied to old conversations in Spam or Trash'. There is a 'Learn more' link with a question mark icon. At the bottom right, there is a 'Create filter' button (highlighted with a red box).

8. You will see a confirmation screen listing the newly created filter.

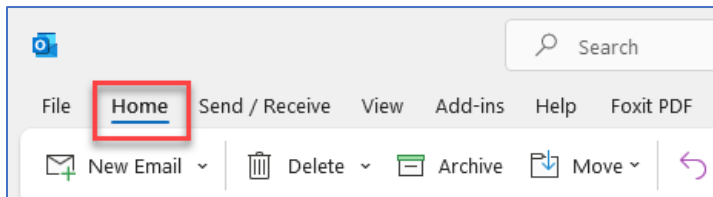


Microsoft Outlook

Whitelist @pensionplanningusa.com for Outlook

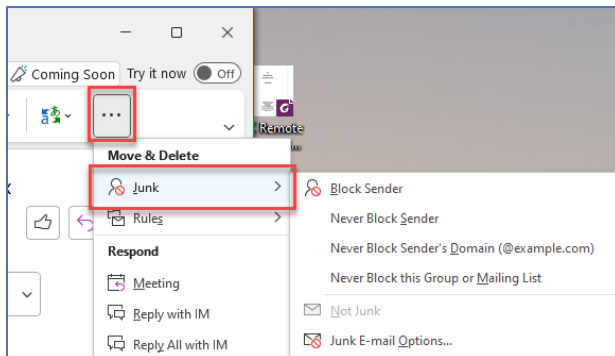
Here are the steps to take to whitelist the PPC Domain for your Microsoft Outlook application.

1. Open Outlook
2. On the top ribbon menu, select **Home**

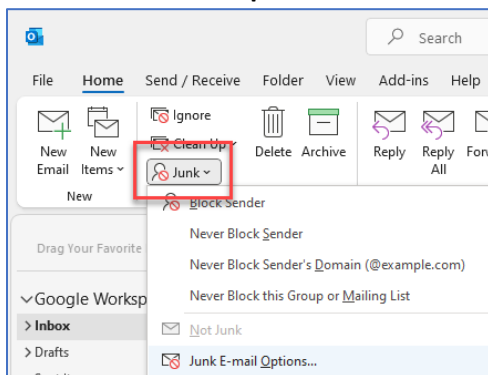


3. Depending upon how your ribbon menu is configured, either select the **three horizontal dots** followed by **Junk** (Simplified Ribbon Example) or select **Junk** directly (Classic Ribbon Example).

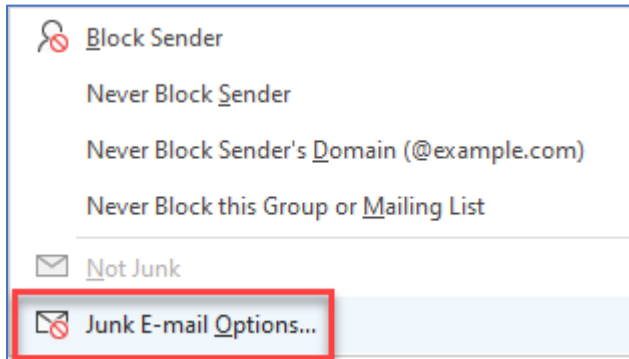
Simplified Ribbon Example:



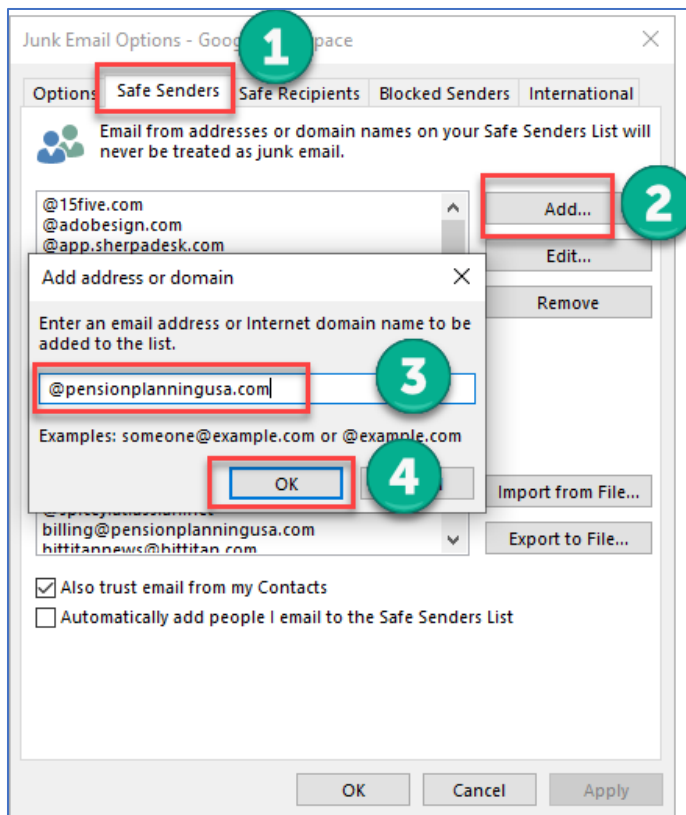
Classic Ribbon Example:



4. Click on the **Junk E-mail Options**



5. The following screen will appear. There are four steps to complete on this screen
 - a. Click on **Safe Senders** tab
 - b. Click on **Add**
 - c. Enter **@pensionplanningusa.com** in the box provided
 - d. Click **OK**



6. Confirm the domain (**@pensionplanningusa.com**) has been added to the list. Click OK to save.

