

401k Averages Book

Service Summary Worksheet

<i>PARTICIPANT SERVICES</i>	<i>Your Plan Services</i>	<i>Service Availability</i>
Transactions		Live Operator, Voice Response Unit, Internet
Statements		On-Demand, Personal Rate of Return
Education		In-Person, Internet, Targeted
Advice		In-Person, Phone, Internet, Managed Account
Automated		Enroll, Increase, Rebalance
Investment Options		Single Fund Family, Open Platform, Brokerage Window
Multi-Lingual		Live Operator, VRU, Communication Materials, Meetings
Other		
<i>PLAN SPONSOR SERVICES</i>	<i>Your Plan Services</i>	<i>Service Availability</i>
Sponsor Plan Information		Standard & Custom Reports, Electronic Processing
Document Support		Prototype or Custom, Signature Ready 5500
Fiduciary Support		Tools, Conferences, Updates
Reviews		Quarterly Investment & Plan, Annual Business Plan
Outsourcing		Transactions, Enrollment, Loans, QDRO
Guarantees		Satisfaction, Timeliness
Roth 401(k)		Yes
Other		