



Keeping our Plan Sponsors connected —
www.myretirementfuture.comTM

Education. Enrollment. Support.

Monitoring your company's retirement plan activity and reporting has never been easier.
Access to the Plan Sponsor site is just a click away at www.myretirementfuture.comTM.

Plan Sponsor Website Tools

▲ Plan level reports

- » Summary by fund
- » Summary by source
- » Detail by fund
- » Detail by source
- » Transaction detail
- » Statement on demand

▲ Participant reports

- » Completed web transactions
- » Beneficiary change history
- » Distribution/loan status
- » Eligible employees
- » Employee list
- » Loan report
- » Login history
- » Outstanding spousal consent forms
- » Pending web transactions
- » Participant searches and list

▲ Information center

- » Newsletters
- » Fund home pages
- » Plan highlights
- » Plan documents
- » Annual reports

▲ Fund Information

- » Fund list and links
- » Fund performance
- » Price history
- » Short term redemption fees

▲ Auditor's ToolBoxTM

- » SAS 70 Audits
- » IVR/Web
- » Participant Transactions
- » Participant Distributions
- » Statement of net assets
- » Payroll remittance report
- » Testing for discrimination
- » Plan tax status

▲ Action on Participant

- » Access participant account
- » Unlock participant account
- » Add participant

▲ Message center

- » Create messages for participant to view online

We are happy to answer your questions. Our Help Line — 888.284.8213 — is staffed from 7:00 a.m. to 7:00 p.m. central time Monday through Friday. Call us today!

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