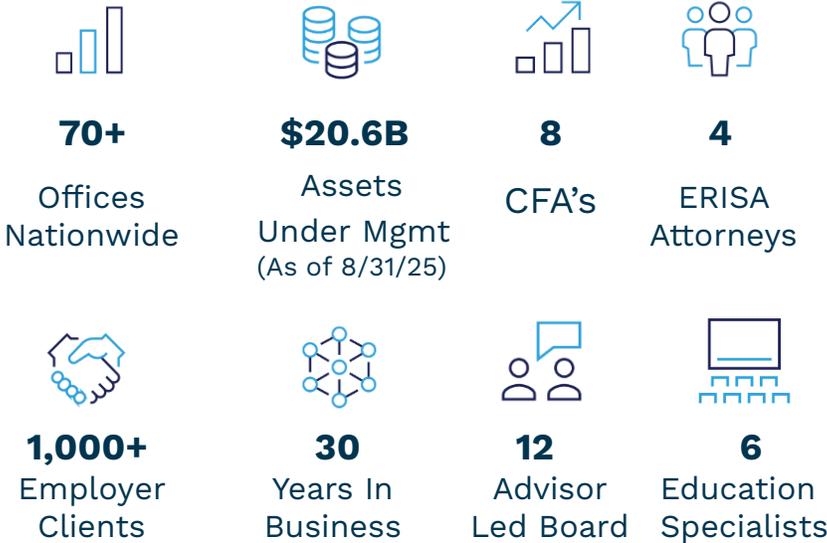
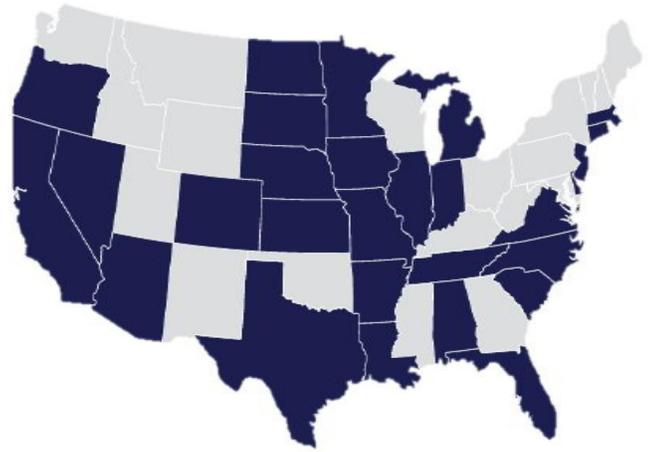


FAST FACTS



NATIONAL FOOTPRINT



FIDUCIARY GOVERNANCE

- Vendor Search & RFP/RFI
- Vendor Fee Negotiations
- Committee Charter
- Committee Meeting Minutes
- Fiduciary Education & Training
- Maintain Fiduciary Files
- Annual Fee Benchmark Reports

INVESTMENT ADVISORY

- ERISA 3(38) or 3(21) Fiduciary
- Investment Policy Statement
- Quarterly Investment Reporting
- Fund Manager Selection & Monitoring
- QDIA Due Diligence & Analysis
- Share Class Fee Efficiency
- Proprietary Managed Account Program

EMPLOYEE ENGAGEMENT

- Custom Education Campaigns
- Measure Education Efforts
- Group Meetings
- Participant Meetings-in person or virtual
- One on one Financial Coaching/Planning
- Monthly Webinar Series
- Financial Wellness Services
- Thrive Student Loan Program
- Self Service Scheduling Tool

CONSULTING & OVERSIGHT

- Plan Design Review & Benchmarking
- Regulatory & Legislative Updates
- Oversee & Monitor Calendar Deadlines
- Compliance & Plan Health Testing
- Assist with Corrective Actions
- IRS & DOL Audit Support
- Merger & Acquisition Guidance
- 5500 & Audit Assistance
- Oversee Distribution of Required Notices