

Service Plan 2022

Service	Description	Target Month	Month Delivered
Fiduciary Investment Review	Market review, investment policy statement, Scorecard Methodology™, fund scores and considerations	January April July October	- - - -
TDF Fit Analysis	Thorough process to identify a “best fit” target date fund series based on participant demographics, as per DOL guidance	April	-
PlanFees Benchmarking		July	-
Provider Analysis	Executive summary, fee summary, administrative fee detail, total cost analysis, investment comparison and plan service highlights	April	-
Newsletters and Memos	Plan sponsor newsletters and employee memos	Monthly	Monthly
Client Advocacy	Based on our strong relationships with service providers and our plan management acumen, we are positioned to promote positive relations and outcomes between the plan and their service providers	Ongoing	Ongoing