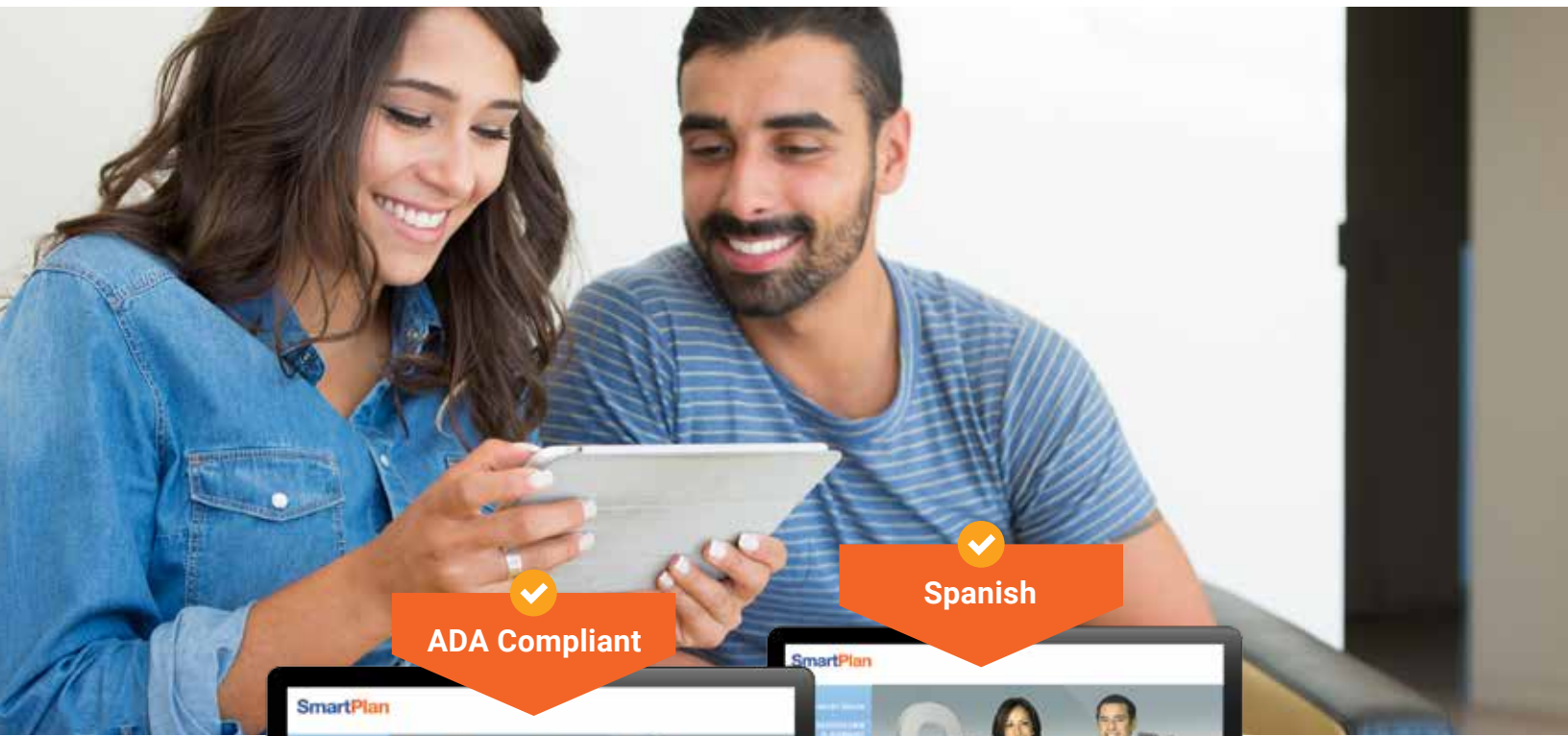


Anytime. Anywhere.

- Simple, complete enrollment solution for providers and their clients
- One-of-a-kind online enrollment experience for retirement plan participants
- Turnkey solution—requires virtually no integration



✓
ADA Compliant

✓
Spanish



Effective

After just five weeks, plans using SmartPlan Enroll see a 25% increase in participation, on average.

Week 0

42.58%

25%
increase

Week 5

53.14%

Designed to Simplify

Behavioral finance research shows the three main roadblocks that prevent individuals from enrolling in their retirement plan.

- Overwhelmed by the complexities of enrolling
- Don't know how much they should save
- Confused about how and where to invest

Designed to simplify the enrollment process, SmartPlan Enroll helps participants determine how much and where to invest.

SmartPlan Enroll uses small, incremental triggers to motivate employees to take specific actions. Users watch a 90-second video, select a contribution amount, or make an investment election during a single online session that takes place whenever and wherever the employee wants.

Features and Benefits

Customizable and Plan-Specific

The employee enrollment experience can be customized, both at the provider and sponsor levels. Add a custom logo and colors, or adjust the Risk Profile Questionnaire to align with your plan sponsor's specifications or existing materials. Every enrollment experience is unique—from plan highlights to vesting to investments. We'll tailor the content to reflect your plan sponsor's design and preferences, from start to finish.

5 Reasons for Online Enrollment

- 1) Reduces administration and resource burden for both you and your plan sponsor
- 2) Simplifies and allows for more timely, on-demand reporting
- 3) Can be delivered in English and Spanish
- 4) Reduces strain on call center
- 5) Reduces enrollment kit printing and distribution costs