

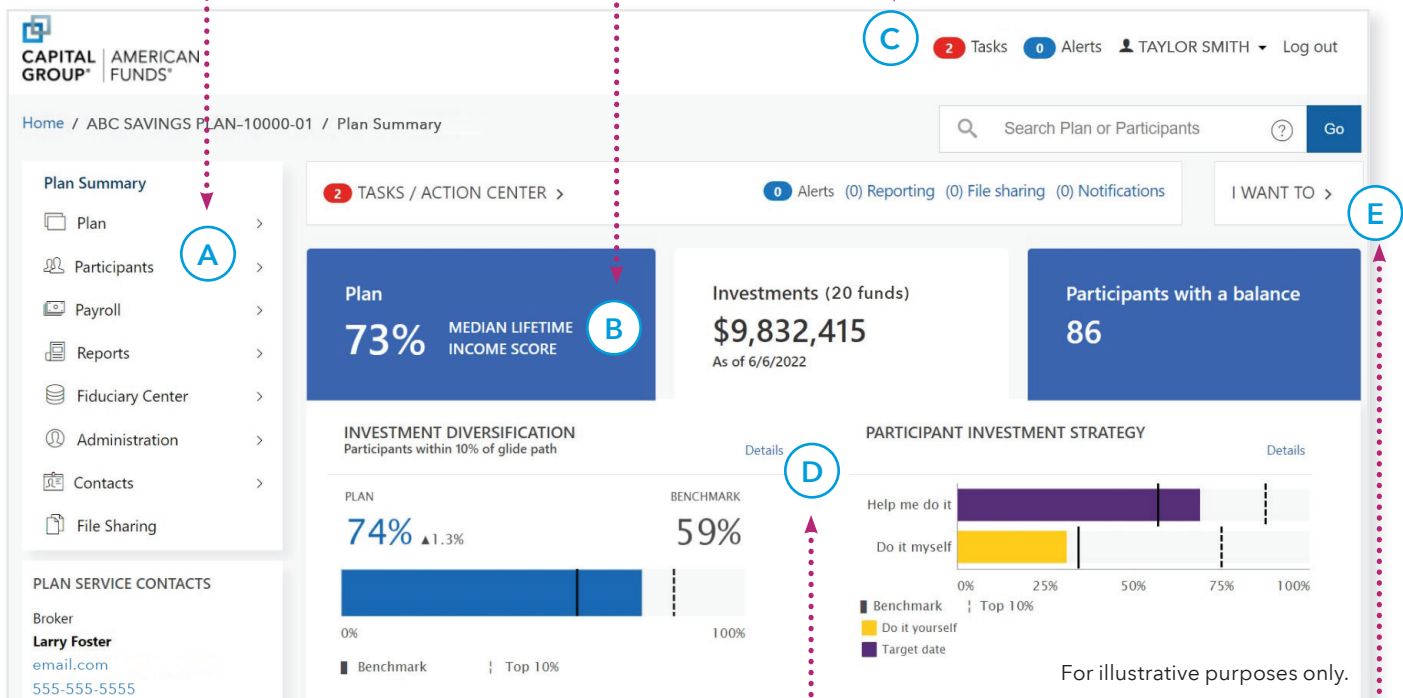


# A better online experience

## Sponsor/financial professional website features

The PlanPremier® website for plan sponsors (Plan Service Center) and financial professionals (PartnerLink®) has tools and features for effective and efficient plan management.

- A** **Straightforward menus** make it easy to navigate the site – to get plan and participant information, upload payrolls, download or customize useful reports, share files and more.
- B** **High-level summaries** highlight key data of the plan, investments and participants.
- C** **Personalized notifications** include alerts with important messages and reminders about tasks that need to be completed, such as distribution approvals.



- D** **Colorful graphics** provide easy-to-understand illustrations of plan data; additional visualizations are available from the Data Library in the Reports section.
- E** **Common tasks and services** are easily accessible under the I WANT TO menu.

# Participant website features

The PlanPremier participant website is designed to make it easy for workers to manage their accounts and make informed decisions that can improve their retirement outlook.

- A** **Total net worth** is displayed with the option to link to outside accounts for a more complete view of a participant's overall financial picture.
- B** **Retirement summary** shows personalized estimated income, health care costs, peer comparisons and more.\*
- C** **Easy-to-understand educational content** is available through the ICanRetire® link.
- D** **Spanish translation** can be made with one click, changing the website and account statements to Spanish.

The screenshot shows the PlanPremier participant website interface. Callout A points to the 'NET WORTH' section showing \$67,218.37. Callout B points to the 'In retirement starting 2029' section showing an estimated monthly income of \$5,492.78. Callout C points to the 'ICanRetire' link in the top navigation. Callout D points to the 'Español' language option. Callout E points to the mobile app view of the account summary. Callout F points to the 'Financial wellness' section showing budgeting and cash flow. Callout G points to the 'Add or update your beneficiary' section. Callout H points to the 'I want to...' section with various action items like 'Update personal information' and 'Upload a document'.

For illustrative purposes only.

- E** **Mobile app** allows convenient account management on smartphones and tablets.
- F** **Financial wellness illustrations** are customized graphics that appear when outside accounts are linked and reflect topics such as cash flow, budgeting, debt paydown and more.
- G** **Personalized insights and next steps** provide useful, relevant suggestions based on participant and account information.
- H** **Frequently used tools, content and transactions** are easily accessible in a single click.

## Advanced online security

To protect participant accounts, the website features sophisticated security measures, including multi-level encryption, proactive security alerts, multifactor authentication and bank-level auditing.

\* Certain information may not be available for all plans and participants.