



	RecordkeeperDirect	PlanPremier-TPA
<b>Plan services</b>		
Customized plan and investment review reports	✓	✓
Payroll integration	✓	✓
Online invoicing and ACH payments	✓	✓
Employee vesting tracking	✓	✓
Deferral election tracking	✓	✓
Corporate trustee services (additional fees may apply)	✓	✓
Notice delivery service (additional fees may apply)	✓	✓
Beneficiary tracking (additional fees may apply)	✓	✓
Pre-approved plan document	Provided by TPA	Provided by TPA
Compliance testing	Provided by TPA	Provided by TPA
Form 5500 preparation	Provided by TPA	Provided by TPA
Interactive analytics dashboard to monitor plan health		✓
Auto enrollment and escalation services		✓
Eligibility tracking and notification		✓
<b>Participant services</b>		
Online enrollment	✓	✓
Customized enrollment education website, emails and materials, including Spanish materials	✓	✓
Mobile app	✓	✓
Educational content and interactive planning tools	✓	✓
Investment and fee disclosure	✓	✓
Online distribution requests	✓	✓
Online loan requests		✓
Personalized income projections, peer comparisons, health care cost estimates and budgeting tools		✓
Spanish website and statements		✓
Distribution kits mailed to participants		✓

**Investors should carefully consider investment objectives, risks, charges and expenses. This and other important information is contained in the fund prospectuses and summary prospectuses, which can be obtained from a financial professional and should be read carefully before investing.**

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