Nationwide Digital Transformation

April 2021



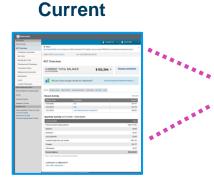




Digital Transformation & Self-Service

Web Experience

Participant Website Redesign & Self-Service Enhancements 2020-2021



Pre-Login



Post-Login >>

Acct Summary					
	~	ID: 235698	71 Withdrawal request	>	Payment sent
		Withdrawal type Withdrawal option Payment method	Retirement Partial lumpsum Direct deposit to Chase Bank Account xxxxxxx234	Gross amount Federal Tax withheid State Tax withheid Net amount	\$1,000.00 -\$200.00 -\$20.00 \$780.00
		t date t	ecords show your financial institution these funds will be deposited in your ition's deposit rules.	has received your withdraw account is based on your fir	al. The tancial



Plan Sponsor Website Redesign & Self-Service Enhancements 2020-2021



Pre-Login



Our focus and commitment are to help you and your employees build a better retirement future. See what we offer hold make us your proference partices

Post-Login >>

User Account Management

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Role features and permissions						
Note capabilities	Prinary	Manager	Reporting	Plant		
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View detailed plan-data, statements, functions	•	•	•			
Create and view reports		•	•			
Upload Nes		•		•		
Process payroll		•		•		
Monage staff user accounts		•				
Vew individual participent account information	-					

Participant List & Details Enhanced Search

Participant	details				See what participant
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Address 708 S	0/1968 EUGEN KT GDON, MD 21009-2976	Plan typ Plan nu		457 0056984001	More demographic information
Account overview Employment status: Em Solery Reduction		\$448,294.49	Beneficiaries Primary		
SDBA belence Total asset balance		\$0.00 \$448,394.49	JYIA CERE	SNAK	100%
Last contribution: 02/05 Selery Reduction	2021	\$1,000.00		re are no benefic	aries to display. Not Enrolled
			Proveccourt		More account information





Advancing Participant and Plan Sponsor Experiences – What's Next in 2021?

PARTICIPANT Experience Enhancements

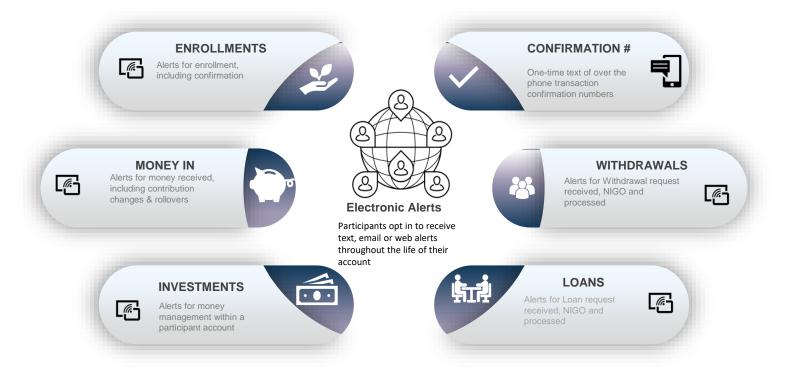
- Website redesign continued enabling new self-service options
 - > Additional Participant Alerts (slide 5)
 - Online Withdrawals initiation of Unforeseeable Emergencies, Financial Hardships & Rollovers
 - On-Demand Statements
- My Retirement Mobile App enhancements
- Statement Redesign (slide 6)

PLAN SPONSOR Experience Enhancements

- Plan sponsor website redesign enabling more self-service options
 - Participant List & Details Search (slide 7)
 - Task Center
 - Resource Center



Participant Alerts Roadmap





Participant Statement Redesign

Summary of Changes

- A redesigned participant statement that quickly and easily answers the questions:
 - How is my account performing?
 - Am I on track for retirement?
- New data visualizations utilizing full color graphics
- Plan customization that provides the ability to turn sections on and off and utilize custom labeling
- Greater self-service for the participant that allows for on-demand statements on the website

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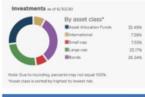
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SANDRA MILLS			CONTACT US	2
1245 BROADWAY YUMA AZ 54321-4			Manage your account at www.retirementse	arvicing.com
			Call a Pian Representative at 1-888-555-42 TTY: 1-777-555-1212	42
			PO Box 123456 Brunswick, DE 12345-1234	
ACCOUNT B	ALANCE AND PERFO	RMANCE	QUARTERLY ACTIV	VITY
	(AS OF 6/30/2020)		(AS OF 6/30/202	
Total balance		\$51,458.16	Previous quarter ending balance	\$48,237.58
Outstanding loan b	alance	\$844.76	Contributions	\$868.92
Quarterly rate of re (4/1/2019 - 6/30/2020)	eturn	2.1%	Rollovers/Transfers-in Dividends* Loan payments	\$0.00 \$0.00 \$317.10
1 year rate of return (7/\/2019 - 6/30/2020)	n	8.3%	Investment gain/loss and Interest Fees	\$1,199.80 - \$10.00
Health Savings Acc		\$2,914.37	Withdrawals	\$0.00
For more information call 1-	(896) 555-1212		Current quarter ending balance	\$50,623.40
			Vested balance	\$49,887.90
			* Hay consist of dividends and fund reimbursements	
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	/30/20 By asset class*			38 \$51,458
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CITY OF SPRINGFIELD PUBLIC SERVICES

YOUR QUARTERLY RETIREMENT ACCOUNT STATEMENT



Plan Sponsor Participant List & Detail Search – Live on 4/26!

Quick access to help you manage important participant account details

- A full participant list with employment status filter
- Provides an enhanced search feature and additional view to see and edit in depth details on participants
- Can be restricted for secondary users
- Users can continue to "see what participant sees"

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Account ove	rview (as of 02/19/2021)					
Employment sta			Beneficiaries			
Salary Reduction		\$448,194.49	Primary			
SDBA balance		\$0.00 \$448,194,49	JYIA CERE	SNAK		100%
		\$440,154.45	Contingent			
Last contribution Salary Reduction		\$1,000.00	• The	re are no benefici	aries to display.	
			ProAccoun	t	Not	Enrolled



Thank you!



