















A year in review.

2021 Experience Milestones.



	Q1	Q2	Q3	Q4
Communication & Education	<p>America Saves Week leverages interactive scenarios that allow participants to explore saving opportunities</p> 	<p>National Financial Literacy Month tests participants' knowledge on foundational components of financial wellness</p> 	<p>Account management tips provides tips on mobile account management, cybersecurity best practices and more</p> 	<p>National Retirement Security Month encourages participants to take at least one step toward achieving their financial goals</p> 
Participant Experience	<p>New mobile enrollment enables your participants to enroll in your plan using their smartphone</p> 	<p>Self-Service Retirement Pathfinder® helps participants model scenarios, adjust market conditions and explore saving strategies</p> 	<p>Document exchange portal simplifies the secure experience of digital document exchange</p> 	<p>Modernized Retirement Manager Intuitive user experience and seamless integration with the rest of the platform</p> 
Plan Sponsor Experience	<p>Payroll services calculations for vesting, limits, eligibility and match</p> 	<p>Advanced metrics and reporting offer more access to data and insights on participant engagement with retirement plan features</p> 	<p>Electronic distribution approval & withdrawals approves participant transactions electronically for in-plan accounts via SponsorFIT®</p> 	<p>Plan retirement health presents a holistic view of overall plan health using goals, industry benchmarking and employee engagement</p> 

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