

WEBINAR SERIES

Maximize Your New 401 (k) Plan: Slavic401k Service and Resource Overview

July 17, 2024

Today's Presenters



Ariana Hall

Senior Manager, Client Success
Slavic401k



Melissa Roman

Account Specialist Team Lead,
Client Success Team
Slavic401k

Today's Agenda

- Slavic401k Overview
- Client Manager Service Experience
- Employer Portal
- Retirement Plan Consultants
- Participant Experience

Webinar Forum

All participants are muted.

Please type questions in the side navigation panel and we will try to address most questions during today's session.

Today's presentation will be posted online at prestigepeo.com/webinars

Who is Slavic401k?



Pioneer and Advocate for PEOs and the Retirement Savings Industry



Original Innovators of the Multiple Employer 401(k) Plan (MEP)



Prioritized Client-Centric Solutions



Advanced Technological Tools



Strategic Legislative Advocacy



Monetary Support to Help Advance the PEO Industry



\$10B Assets Under Administration



Largest 401(k) Provider to the PEO Industry

Prestige Adopters

Ongoing Daily Service Experience

Adopting employers have access to a team of Account Specialists within our Client Success department. Our Account Specialists are accessible by phone and email, 8 a.m. to 8 p.m. ET, Monday – Friday.

Experience Highlights:

- Clear delineation between participant and employer support
- Promote an efficient and positive experience for plan administrators
- The Account Specialist team works closely with internal teams and our Call Center, maximizing synergies across the relationship
- For the first 30 days (7/15 – 8/16), adopting employers have a dedicated phone number (866) 355-7250
- After 30 days, call (800) 356-3009, option 1, followed by option 3 for Adopting Employers
- Email AdoptingEmployers@slavic401k.com

Prestige Adopters

Employer Portal

The Employer Portal allows adopting employers to manage their company's plan entirely online.

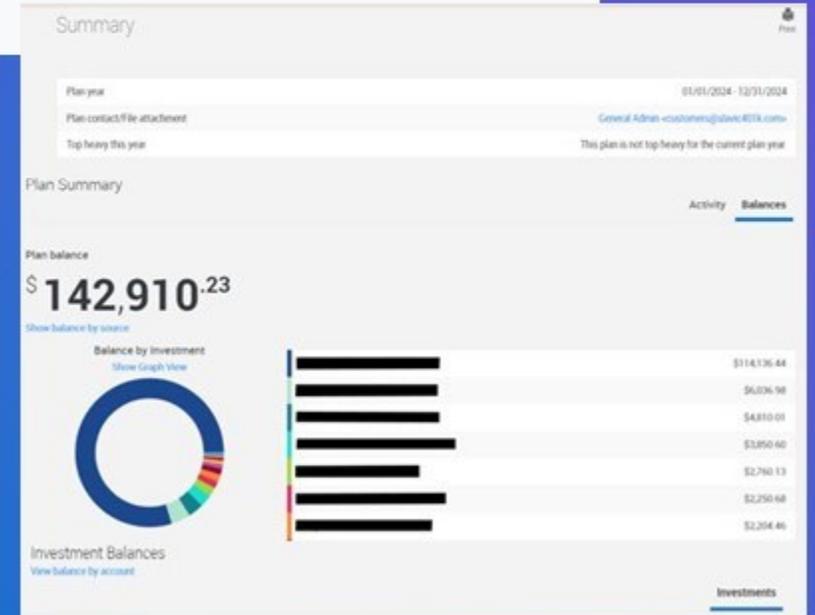
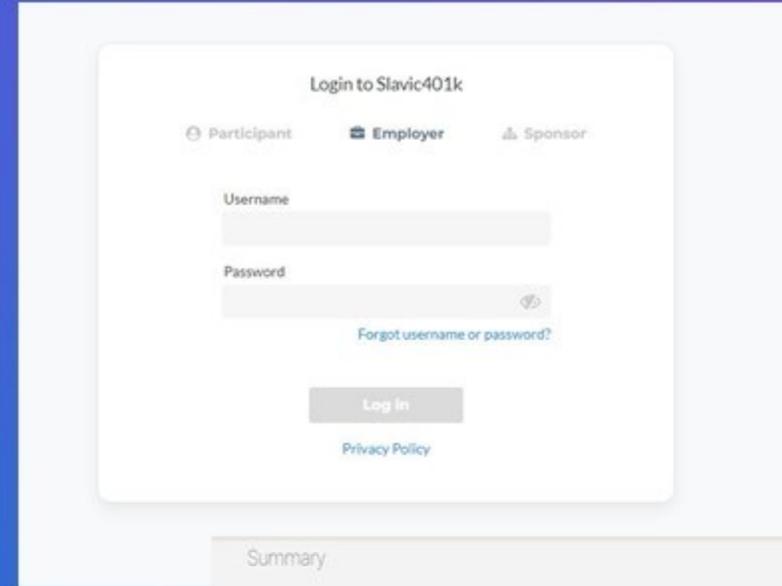
Plan Summary: Total Plan Balance by source or investment

Balance by Source: Balances are displayed by Match, Roth, Pretax, Loans and other sources

Balance by Investment: Balances are displayed by investment funds

Investment Balances: Balances by investment type and include the number of participants in each investment

Payroll Contributions: Totals for recent contribution files. By selecting the date, you can see details on the contribution amount by participant.



Employer Portal

Employee Search

Select EE Search from the menu to view participants in the plan, as well as their status and balance. When you select the social security number you will see the participant's account portal exactly the way they see it when they log in.

Employee Listing

Open employee

Employee SS#

Please enter search criteria and press submit.

SS# EEA SS# range to

First name Last name Balance

Plan Division Plan status Employment status

ABCDEFGHIJKLMNOPQRSTUVWXYZ

SS#	Name (Last, First Middle)	Plan	Employer	Division	Employment Status	Plan Status	Ending Balance	Edit
██████	██████	██████	██████	Default	Terminated	Inactive		Edit
██████	██████	██████	██████	Default	Terminated	Inactive	\$2.65	Edit
██████	██████	██████	██████	Default	Hired	Active	\$28,771.14	Edit
██████	██████	██████	██████	Default	Terminated	Inactive	\$114,136.44	Edit

Employer Portal

Manage Tab

Transaction History: Detailed transactions by investment, source, type of transaction, date range, and employee. Each transaction can be expanded to provide additional details

Web Requests: Participant online activity for allocations, contributions, pin changes, distributions, loan distributions, and transfers

The screenshot shows the 'Web Requests' form in the 'Manage' tab of the Employer Portal. The form includes a search bar for 'Social security number', a dropdown for 'Transactions to display' (set to 'All'), a dropdown for 'Transaction status' (set to 'All'), a date field for 'From (MM/DD/YYYY)' (set to '06/02/2024'), and a 'Confirmation' field. A blue 'SUBMIT' button is located at the bottom right. Below the form, a message states 'No records available at this time.' The top navigation bar includes 'Dashboard', 'EE Search', 'Manage', 'Plan', 'Forms & Reports', 'Fee Disclosure', 'Payroll', and 'Plan Selection'.

The screenshot shows the 'Transaction History' form in the 'Manage' tab of the Employer Portal. The form includes dropdowns for 'Investment' (set to 'All') and 'Source' (set to 'All'), a dropdown for 'Transactions to display' (set to 'All'), a dropdown for 'Transaction status' (set to 'All'), a search bar for 'Social security number', a dropdown for 'Division' (set to 'All Divisions'), and date fields for 'Start date' (set to '06/02/2024') and 'End date'. There is a checkbox for 'Only display records with redemption fees' which is currently unchecked. A blue 'SUBMIT' button is located at the bottom right. Below the form, there is a table with two rows of transaction data:

Date	Description	Action
> 07/01/2024	Dividend of \$8.73	Show participants
> 07/01/2024	Dividend of \$9.86	Show participants

The bottom of the page contains a copyright notice: 'Copyright © Slavic401k.com. All rights reserved. The contents of this site may not be reproduced or distributed without prior permission. | Problems viewing the site?' The top navigation bar is identical to the previous screenshot.

Employer Portal

Forms & Reports Tab – Participant Reports

Participant Certificate: Account, asset and source summary, detail summary by fund, including beginning balance, contributions, gains/losses, loan payments/transfers, forfeitures, loan distributions, ending balance, and vested balance

Online Statements: Participant accounts, allocation percent, beginning, end and vested balance, contributions and forfeitures, gains/losses, loan payments/transfers, and premiums/loan distributions

Employer Portal

Forms & Reports Tab – Sponsor and Employer Reports

Executive Summary: Comprehensive report many employers use for management meetings that includes all high-level plan details, totals and statistics

Census: Wages, date of birth, hire date, hours of service, and contribution amounts

Confirmed Totals: Summary of plan assets by asset class

Totals Only: Employee's date of birth, hire date, total compensation during the date range entered, eligibility, current deferral percentage, hours of service, years of service for vesting, highly compensated employee status, and projected plan eligibility

Eligible Not Deferring: Eligible employees not currently deferring



Plan Adopter Insight

Monthly Email to Company Admin(s)

Plan Adopter Insight revolutionized compliance testing by being the first tool to conduct top heavy and ACP testing on thousands of plans monthly. Plan sponsors stay in the know to avoid end-of-year compliance headaches. Plan Adopter Insight has reduced top heavy occurrences to less than 0.10% of adopting companies.

- Plan demographic data
- Summary of EE and ER contributions
- Compliance testing results
- Plan and compliance news and insights
- Plan asset size/growth
- Employee participation levels
- Deferral amounts
- Matching and/or profit-sharing amounts
- The most subscribed to funds among plan participants
- In-depth monthly market commentary

PrestigePEO SLAVIC401K

401(k) Plan Adopter Insight

Monthly testing is performed on a best effort basis and these results may not apply if your plan was merged this year, is part of a control group, or in other certain situations.

Compliance Testing Status

2022 Top Heavy Trend: 19.81% Passing (≤ 60%)

2021 HCE ADP Trend: 7.28% Passing (≤ 8.26%)

Learn more about compliance testing

401(K) & ECONOMIC EDUCATION

Your Cost Savings Estimate

Based upon national average data, the total expense of your 401(k) plan is **56.85%** lower than the average cost for a plan of similar size.

Plan Summary

PLAN ASSETS: \$3,465,413.79

- 61 employees are participating
- There are 14 highly compensated employees
- 133 participants have balance in their account
- Plan assets increased by \$148,759.00 this month

Monthly Activity

MONTHLY DEFERRALS	MONTHLY MATCH
\$41,881.83	\$0.00

MONTHLY PROFIT SHARING
\$0.00

YTD Activity

YTD DEFERRALS	YTD MATCH
\$487,303.99	\$0.00



Prestige Adopters

Retirement Plan Consultants

The Retirement Plan Consultant (RPC) helps your company navigate complex amendment and testing conversations and decisions.

You can reach this team by emailing the inbox listed below. The inbox has a 24 to 48-hour response time.

Email: csamendmentrequest@slavic401k.com

Prestige Plan Participants

Service Experience

Our Call Center staffs over 55 associates to assist participants via phone from 8 a.m. to 8 p.m. ET, Monday - Friday.
Phone: (800) 356-3009

Key Features and Upgrades

- Multi-step authentication and security processes
- High-end CSR Quality Management tools
- Improved Voice of Customer tools
- Updated phone system with improved access to data
- Work automation to some Client Success teams
- Improved process documentation to drive better caller experience



Email Express

Email Express is a groundbreaking participant communication.

- Expert market commentary to each participant written by our Founder and CEO John Slavic. Email Express also includes educational financial and investing tips, blog posts and more.
- Account balance for every investor, keeping them informed of market conditions and how their account is performing.



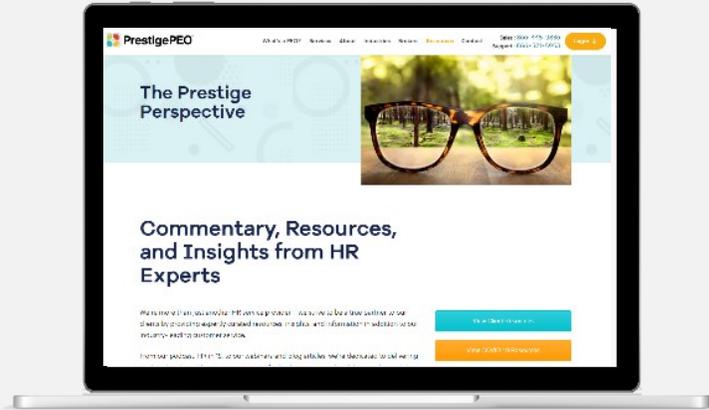
Thank you!

Need Help?

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PrestigePEO



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<https://www.prestigepeo.com/webinars>



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Join us on **LinkedIn, Facebook, Instagram, Twitter, and YouTube** to receive event notifications and weekly updates



Reach out to your support teams – HR and Compliance, Employee Benefits, and Payroll directly from our **PrestigeGO mobile app**



Human Resources, Employee Benefits, and Payroll Simplified

You started your business because you had a great idea. We started our business to handle the rest.