WEBINAR SERIES

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

July 17, 2024

PrestigePEO

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Today’s Presenters

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Slavic401k

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Client Success Team
Slavic401k

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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

PrestigePEO™

Who is Slavic401k?

35 YEARS

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

SLAVIC401K PrestigePEO™

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.

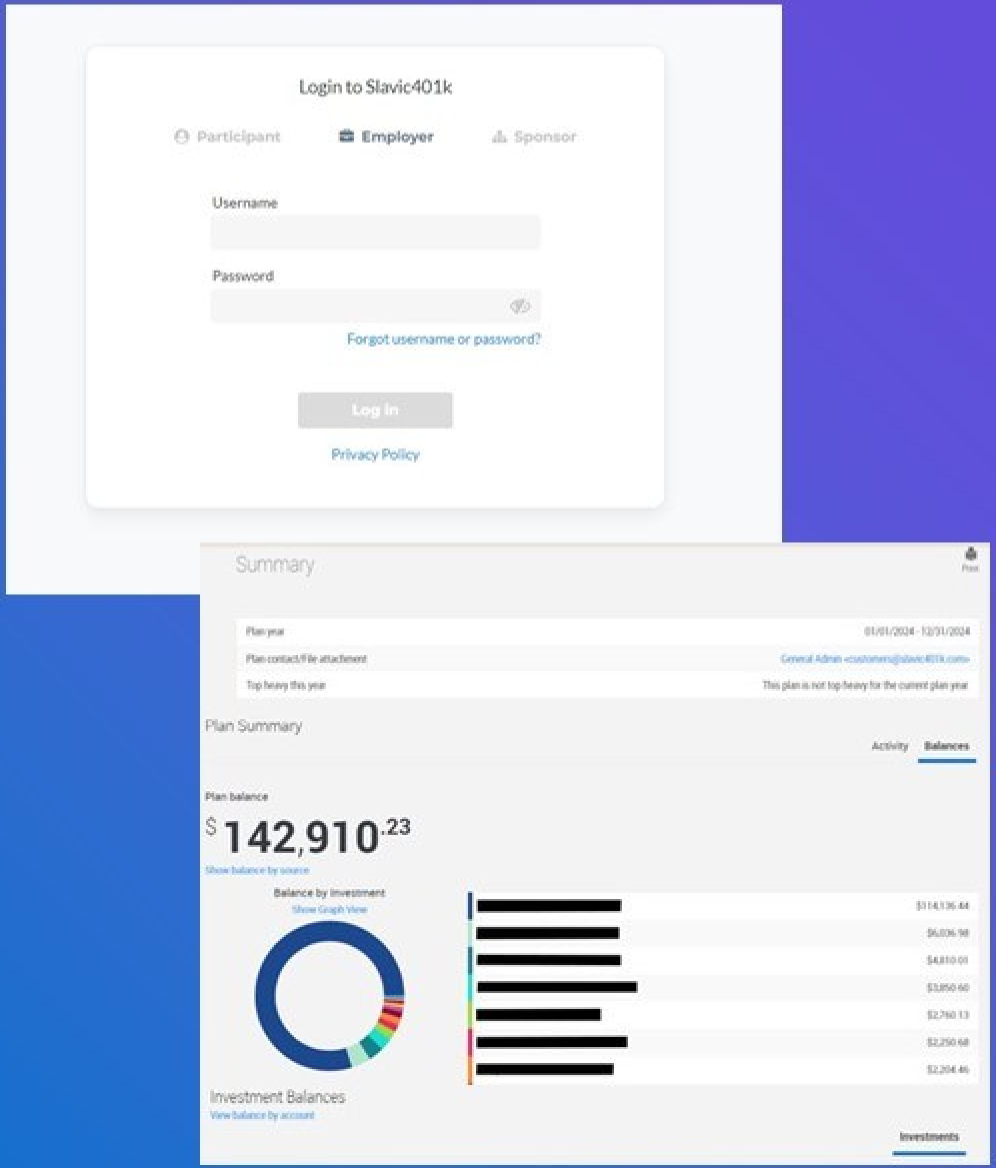
Plan Summary: Total Plan Balance by source or investment

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

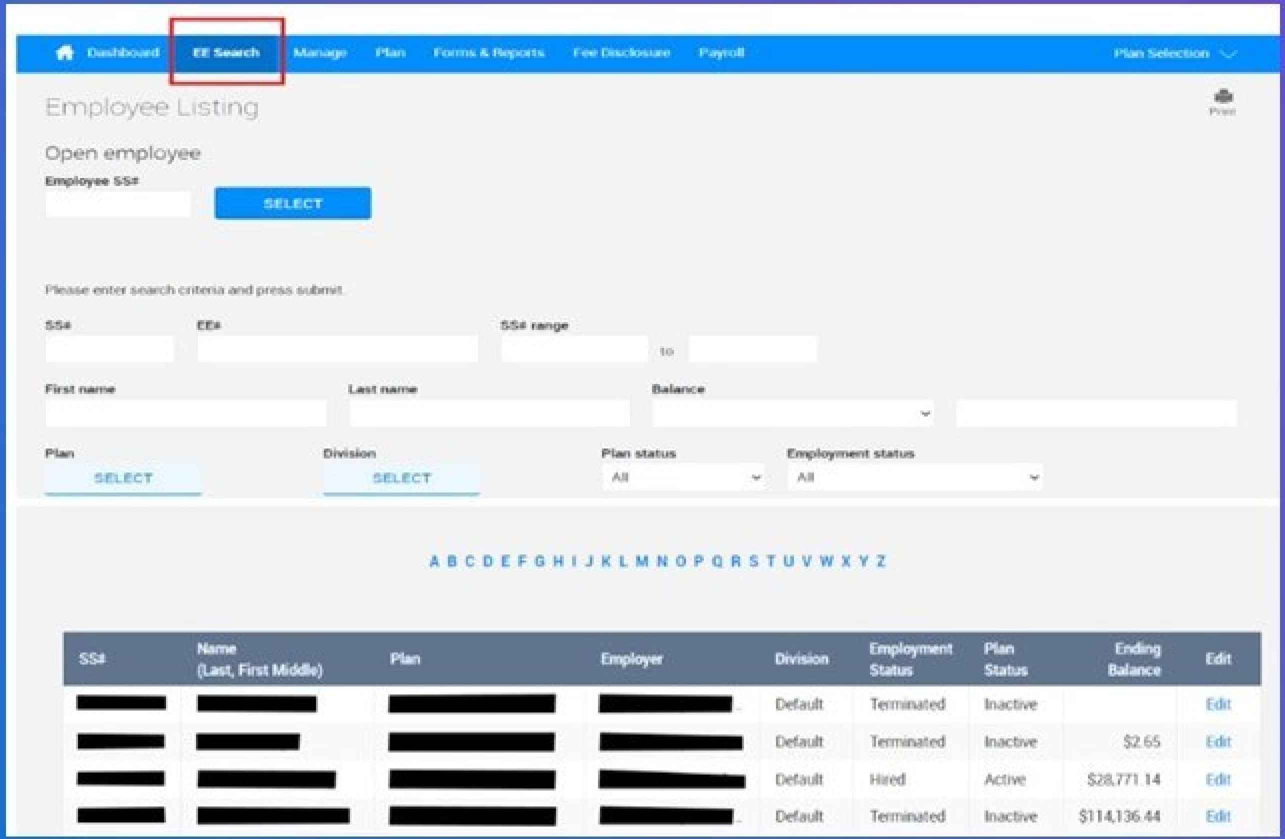
Payroll Contributions: Totals for recent contribution files. By selecting the date, you can see details on the contribution amount by participant.



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.

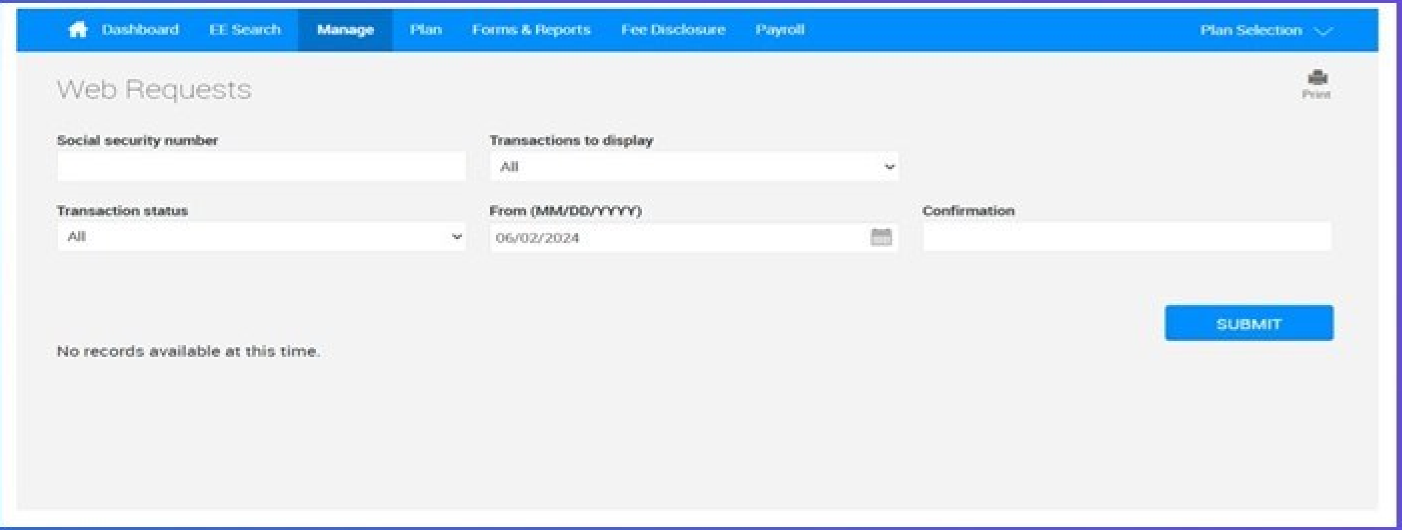


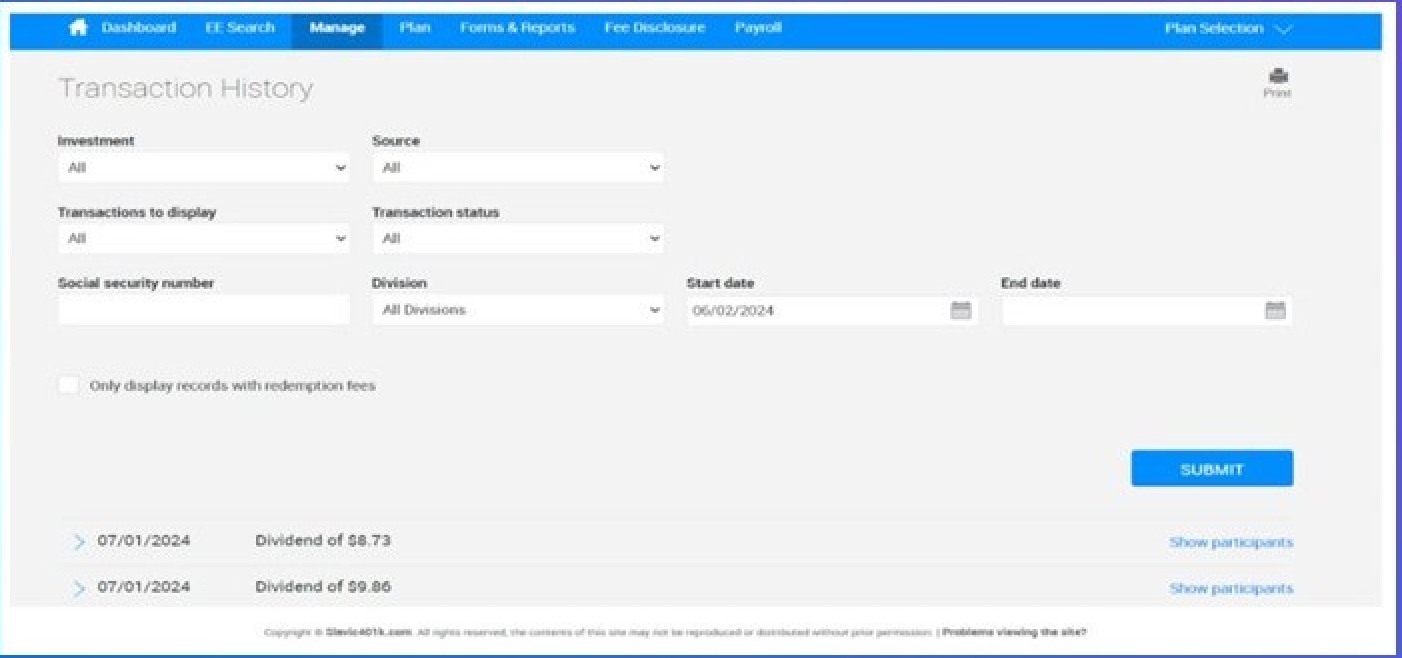
Employer Portal

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





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

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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

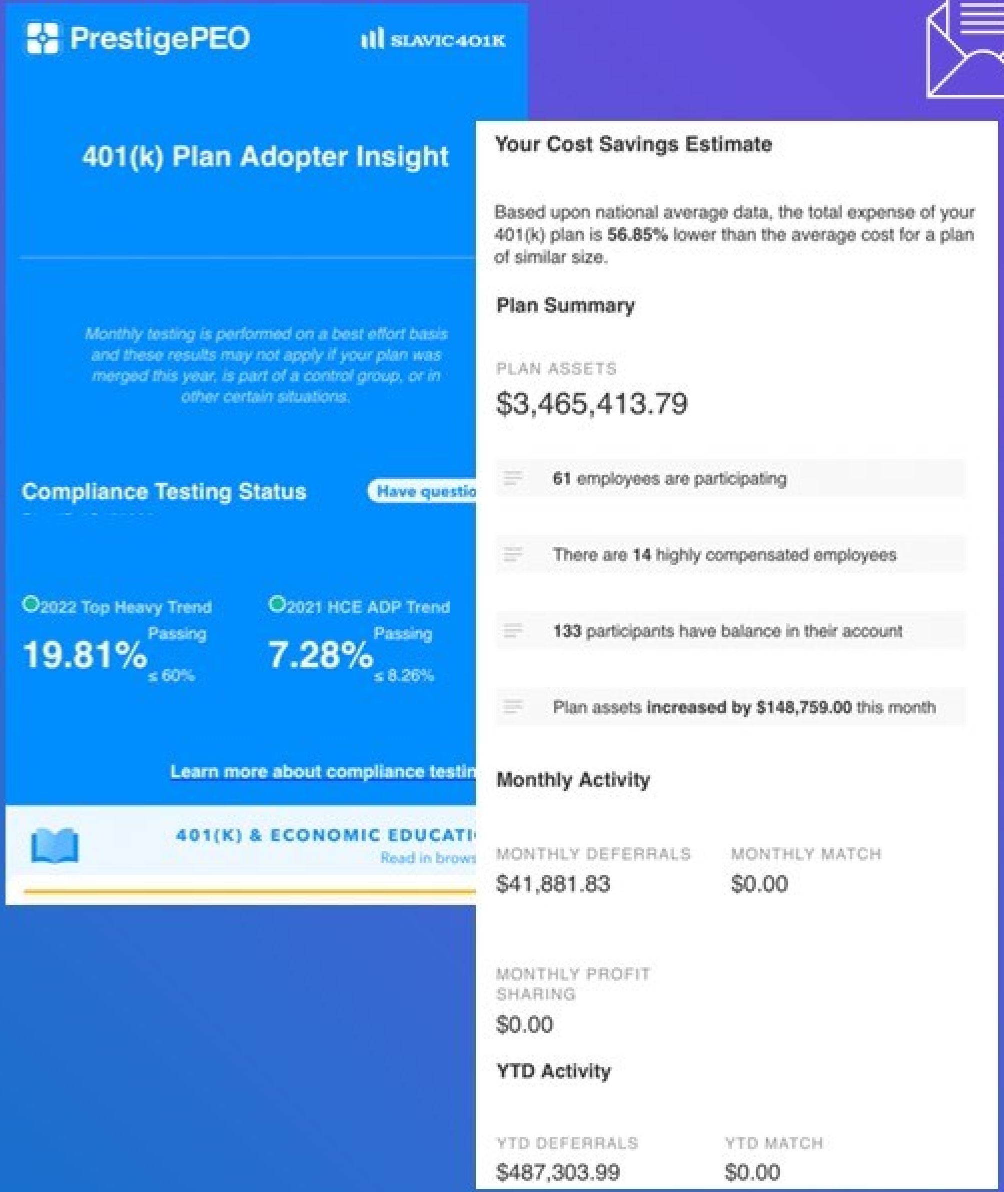
Eligible Not Deferring: Eligible employees not currently deferring

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



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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

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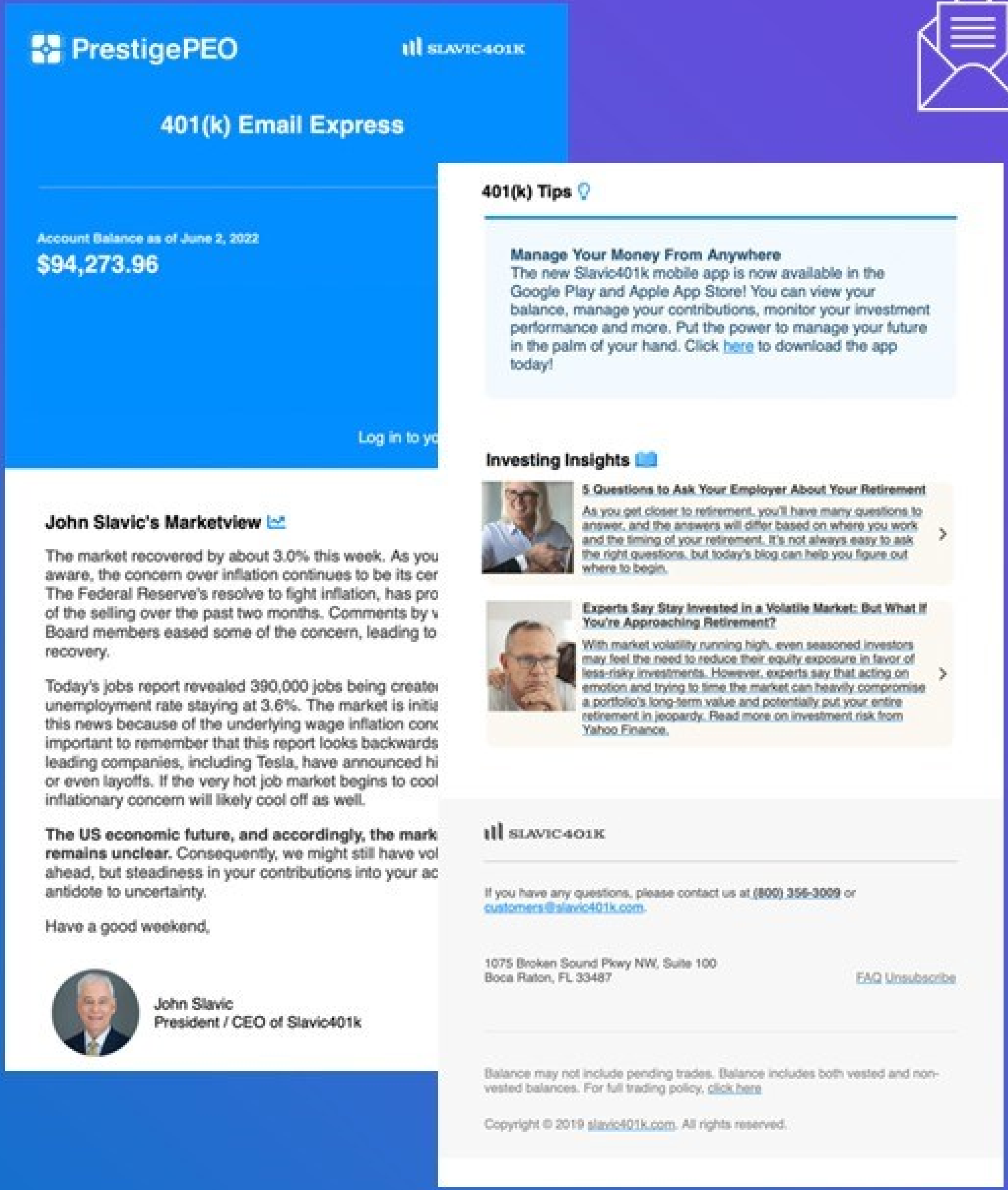
Email Express

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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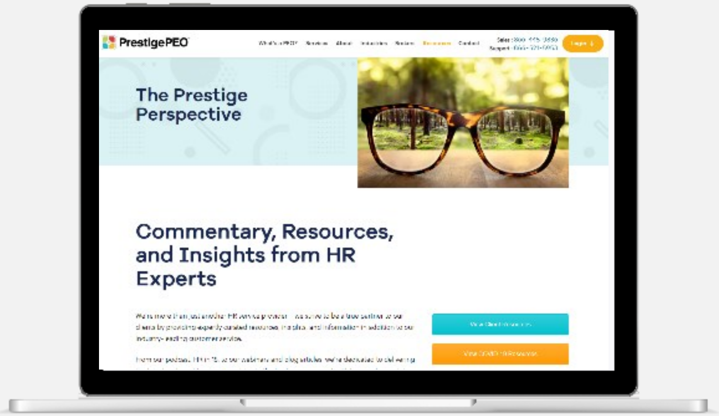

You can view today's presentation and video recording by visiting:

https://www.prestigepeo.com/webinars

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Be on the look out for our email newsletter, **PrestigePEO Insights**

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**

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PrestigePEO™

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.