

## A. Employee Education Materials\*

Customized printed enrollment materials are designed to encourage participation in a company's retirement plan by educating employees on the benefits of investing in a retirement plan program, easing the investment selection process, and explaining specific plan provisions.

\*Enrollment books are available in Spanish



## B. yourinvestmentaccount.com

Participants can access timely information on their account through [yourinvestmentaccount.com](http://yourinvestmentaccount.com). This secure website offers a multitude of tools to help manage their accounts efficiently.

## C. Paperless Enrollment Brochure

Instructions on how to enroll in a company retirement plan through InvestorLink, our voice response system, or the Internet.

## D. Manage Your Account Brochure

Instructions on how to use InvestorLink and [yourinvestmentaccount.com](http://yourinvestmentaccount.com)

## E. Quarterly Statement

Participants receive statements detailing their account balance, any transaction activity, fund performance, and other pertinent information for the previous quarter.

## F. Enrollment PowerPoint

A tool used to educate employees about basic 401(k) concepts, such as tax deferral, compounded interest, and much more. This presentation can be customized to reflect a company's plan-specific information.

