

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. 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

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.

