

# e-Services

for Investment Consultants

## e-Distribution

Our e-Distribution service allows you to tackle this often time-consuming task. With First Mercantile, you have the ability to view and track distributions, including loans. So the next time one of your participants wants to know the status of a distribution or loan, you'll be prepared.

To utilize this service, go to [www.firstmerc.com](http://www.firstmerc.com) and select **e-Distribution** within the **Maintenance** tab.

## e-Notification

Through e-Notification, we provide you with the lead you need to capture participant rollover assets.\* If a plan sponsor submits a request online through e-Distribution, you are automatically notified of the distribution amount via email. You are notified of distributions in the amount of \$25,000 or more. Or, you can select an alternate minimum distribution amount for which you would like to receive notification.

You can customize your options by going to **e-Notification** under the **Maintenance** tab at [www.firstmerc.com](http://www.firstmerc.com).

## e-Reports

First Mercantile has streamlined your monitoring of plan information, whether you're looking to view allocation reports or get participant and plan balances. Simply select the report you want, the format that best suits your needs, and the frequency you want to receive the report via your secure email. Once the report has been sent to your secure email account, you will receive a notification email via your primary email address. You can access your secure email account in the **Contacts** tab of [www.firstmerc.com](http://www.firstmerc.com).

To set up reports to be automatically generated, go to [www.firstmerc.com](http://www.firstmerc.com) and select **e-Reports** from the **Maintenance** tab.

*\*This information is released to you through provisions of the Plan Servicing Agreement.*

 Our e-Services are designed to help investment consultants manage the day-to-day operations of their retirement plans online. These services offer an efficient, user-friendly way to handle routine functions for successful plan management.

 **FIRST MERCANTILE**

A member of the MassMutual Financial Group

[www.firstmerc.com](http://www.firstmerc.com)  
800.753.3682

MassMutual Financial Group is a marketing name for the Massachusetts Mutual Life Insurance Company (MassMutual) and its affiliated companies and sales representatives.