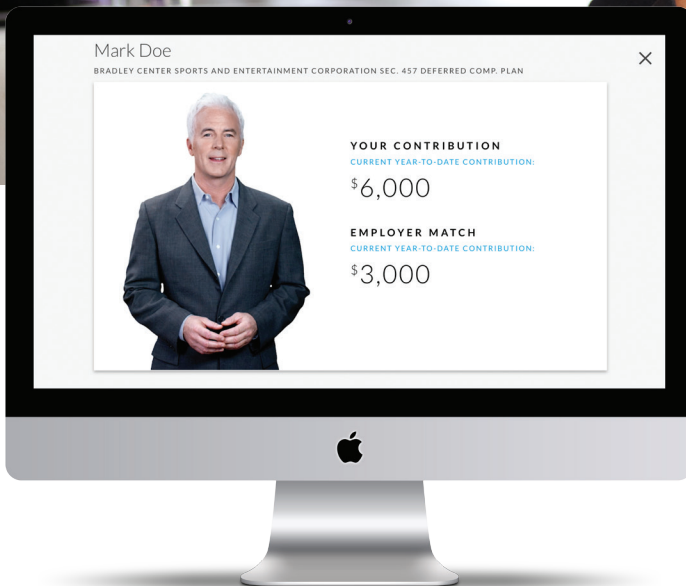
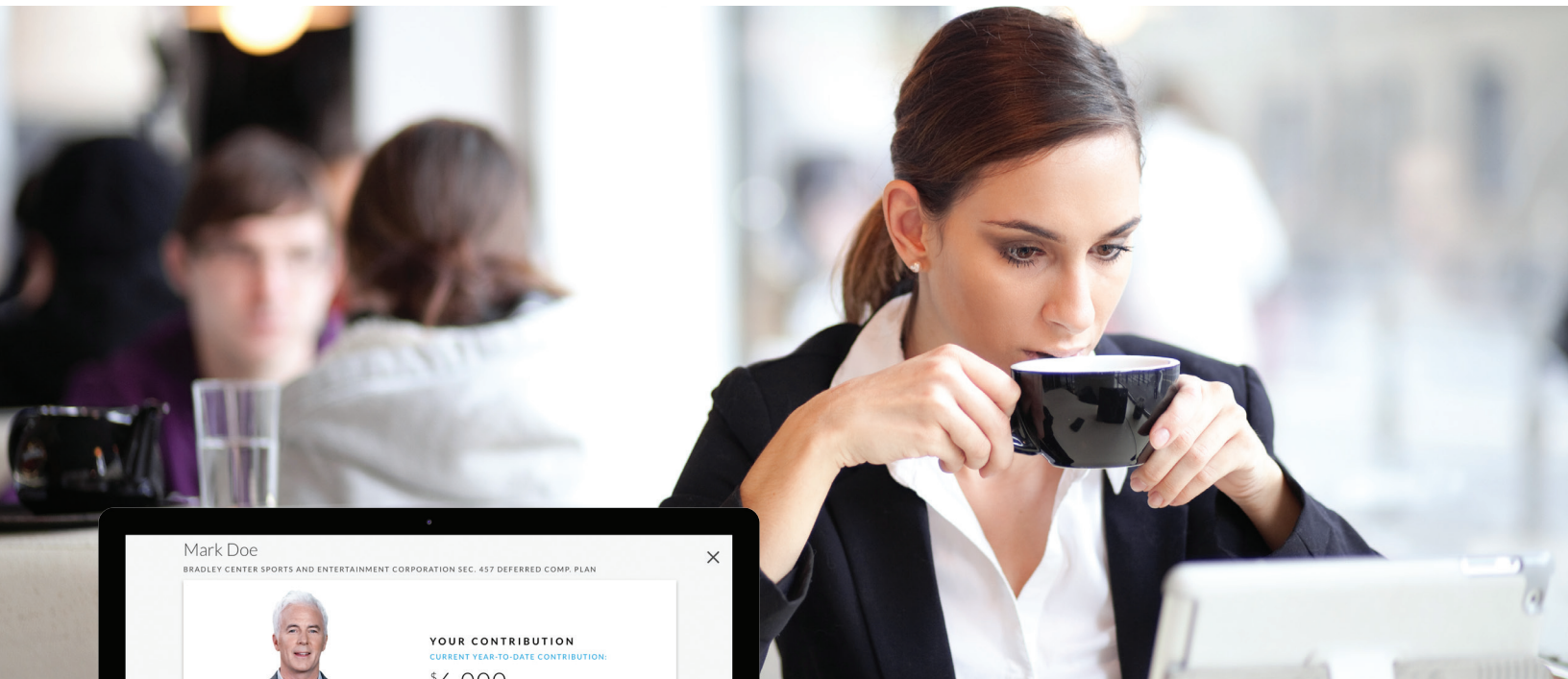


Video-based snapshot that encourages positive actions

Personalized videos offer participants a clear view of their retirement savings progress — and motivate them to take immediate action



Guided and interactive experience

Plan participants often enroll in their retirement plans, and then assume they are on track to a comfortable retirement. PowerView helps them focus on progress at a specific point in time and then helps them decide what steps to take next.

With PowerView, participants receive a personalized, at-a-glance view of their retirement plan.

Personalized information

- Current balance
- Year-to-date contributions
- Year-to-date employer match (if applicable)
- Projected savings at retirement
- Projected monthly payout at retirement



Participants are encouraged to take action by visiting their plan website where they can increase their deferral rate, and even see how it can impact their account balance over the long term. Designed to keep them actively involved in saving and investing, PowerView provides personalized facts and figures, as well as an easy next step.

Targeted Call to Actions

- Maximize the match
- Drive to provider website
- Revisit SmartPlan
- More to come...

PowerView can be customized to reflect plan design features—whether you offer an employer match, a Roth option, and or want to remind participants of their 402(g) limits. In addition to serving as another touchpoint, this targeted, state-of-the-art experience drives participants to the plan website and spurs them to take action.