

Need Retirement Plan or Participant Data? We have a report for that!

Presented by:

Lisa Francis, *Director, Customer Experience Strategy*

Ben Healy, *Vice President, Operations & Client Experience*

Save the Date

UPCOMING EVENTS

June 14, 2017 (For Companies)

17th Annual Educational Exchange

September 23, 2017 (For You & For Companies)

401(k) Fitness Challenge: Get physically fit for financial health

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Today's Agenda

- Scheduled reports
- On-demand reports
- Overview of key reports
- Other suggestions?
- Questions & Answers




Scheduled Reports




Report Type	Examples	Who Receives It
Participant Transaction Confirmations	<ul style="list-style-type: none">• Deferral rate changes• Enrollment confirmations• Personal info changes	Plan's primary contact (one email address)
Notification Reports	<ul style="list-style-type: none">• Loan payoff notification• New & maturing loan summary• Beneficiary confirmations• Auto enrollment reports• Hardship deferral suspension	Contacts designated as report recipients (can be one email address or multiple)


Schedule of Common Reports

Type	Frequency	Time
Participant Transaction Confirmations	Daily	9:30 a.m., 2:00 p.m., & 4:00 p.m.
Loan Payoff Notification	Daily	9:00 p.m.
Hardship Deferral Suspension Notice	Weekly	Fridays @ 6:00 p.m.
New & Maturing Loan Summary	Weekly	Fridays @ 7:00 p.m.
Beneficiary Confirmation (reminder of signatures required)	Monthly	1 st of the month @ 11:00 a.m.
Automatic Enrollment Reports	Monthly	1 st of the month @ 11:00 a.m.

On-demand Reports



Welcome, Lisa Francis   

 View Account

Transactions

Statements, Forms & Reports

Employee Management


Contribution Center

Web Client


Annual Package

Distribution Approval

Reports & Forms

Plan Selection 

Resources

 Print

Reports



Reports

Generate Reports 

Select report group

Participant Statements 

Report Selection

Participant Statement

On-demand statement of your account

Participant Statement with Transaction Detail

On-demand statement with transaction activity by investment

Options

Divisions

All Divisions 

Select employee

All Employees 

...

Select export file type

Adobe Acrobat (PDF) 

Available plan years

01/01/2017 - 12/31/2017 

From

n/a 

To date

n/a 

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On-demand Reports



View Account

Transactions

Statements,
Forms & Reports

Employee
Management

Contribution
Center

Web Client

Annual Package

Distribution Approval

Plan Selection 

Reports


Print



Reports

Generate Reports 

Select report group

Participant Statements

Plan Level Reports

Payroll Reports

Loan Reports

Fee Reports

Distribution Reports

Data Export Reports

Employee Census Reports

Beneficiary Reporting

Account Balance Reports

[Participant Statement with transaction detail](#)

On-demand statement with transaction activity by investment

Options

Divisions

All Divisions 

Select employee


All Employees 

...

Select export file type

Adobe Acrobat (PDF) 

Available plan years

01/01/2017 - 12/31/2017 


From




n/a 

To date


n/a 

On-demand Reports




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Plan Selection 


Reports



Reports

Generate Reports 

Select report group

Participant Statements 


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Participant Statement
On-demand statement of your account

Participant Statement with Transaction Detail
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All Divisions 


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Adobe Acrobat (PDF) 


Available plan years


01/01/2017 - 12/31/2017 


From



To date



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On-demand Reports

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HomeView AccountTransactionsStatements, Forms & ReportsEmployee ManagementContribution CenterWeb ClientAnnual PackageDistribution Approval

Plan Selection

Reports

Adobe Acrobat Reader

Generate Reports

Select report group
Participant Statements

Report Selection

Participant Statement
On-demand statement of your account

Participant Statement with Transaction Detail
On-demand statement with transaction activity by i

Find Employee

Please enter search criteria and press submit.

SS#

EE#

SS# range

to

First name

Last name

Balance
Less than or equal

Select export file type
Adobe Acrobat (PDF)

Available plan years
01/01/2017 - 12/31/2017

From

To date

Print

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On-demand Reports

Plan Selection ▾

Print

Reports



Reports

Generate Reports ▾

Select report group

Participant Statements ▾

Report Selection

[Participant Statement](#)
On-demand statement of your account

[Participant Statement with Transaction Detail](#)
On-demand statement with transaction activity by investment

Options

Divisions

All Divisions ▾

Select employee


Select employee ▾

.....

Select export file type


Adobe Acrobat (PDF) ▾

From

01/01/2017 

« April 2017 »

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
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23	24	25	26	27	28	29
30	1	2	3	4	5	6

04/30/2017 

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On-demand Reports

Plan Selection ▾

Print

Reports



Reports

Generate Reports ▾

Select report group

Participant Statements ▾


Report Selection

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On-demand statement of your account

[Participant Statement with Transaction Detail](#)
On-demand statement with transaction activity by investment

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Select Employee

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Select export file type

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From

01/01/2017

« April 2017 »

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04/30/2017

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On-demand Reports

Plan Selection ▾

Print

Reports



Reports

Generate Reports ▾

Select report group

Participant Statements ▾

Report Selection

[Participant Statement](#)
On-demand statement of your account

[Participant Statement with Transaction Detail](#)
On-demand statement with transaction activity by investment

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Select Employee

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From

01/01/2017

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« April 2017 »

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30	1	2	3	4	5	6

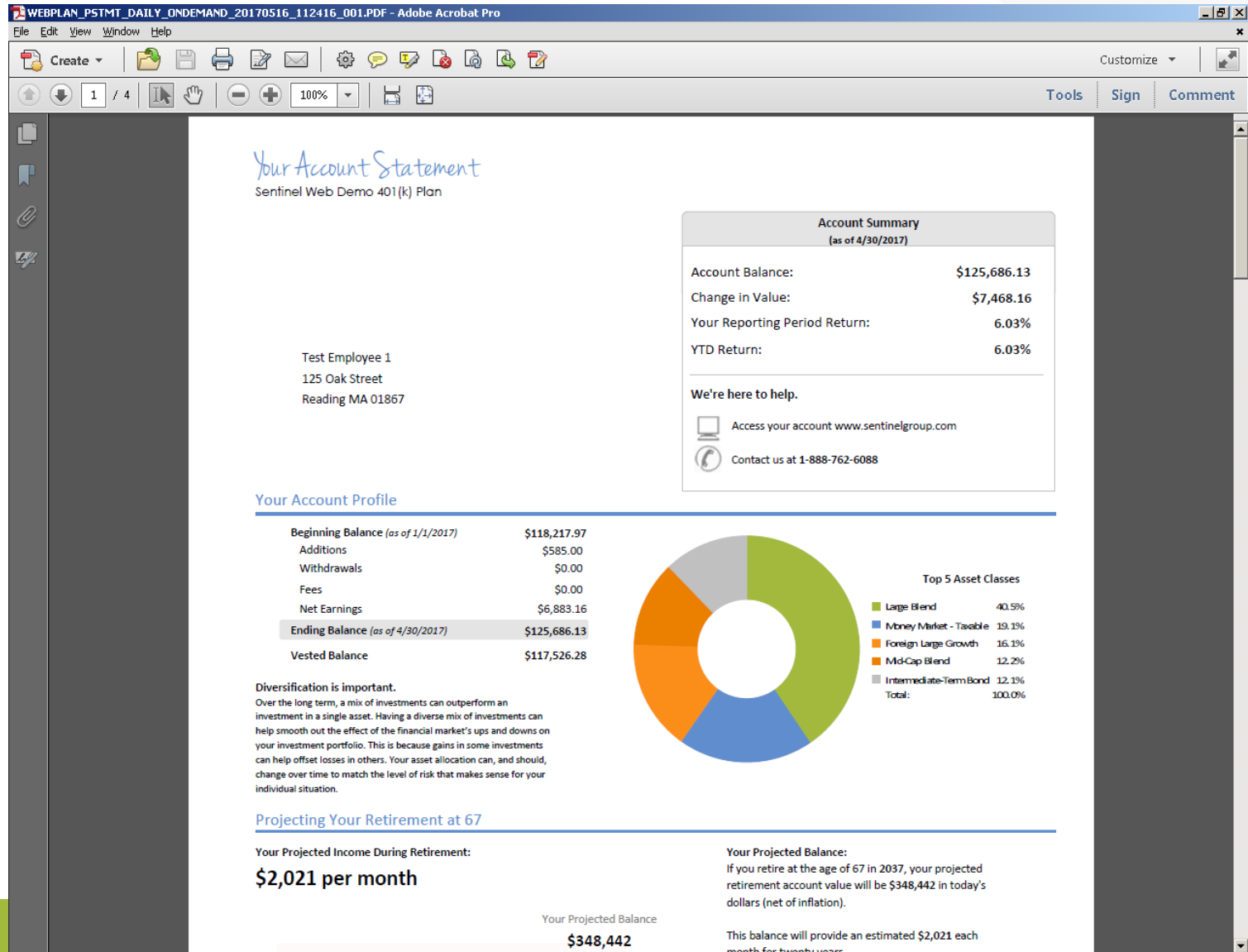
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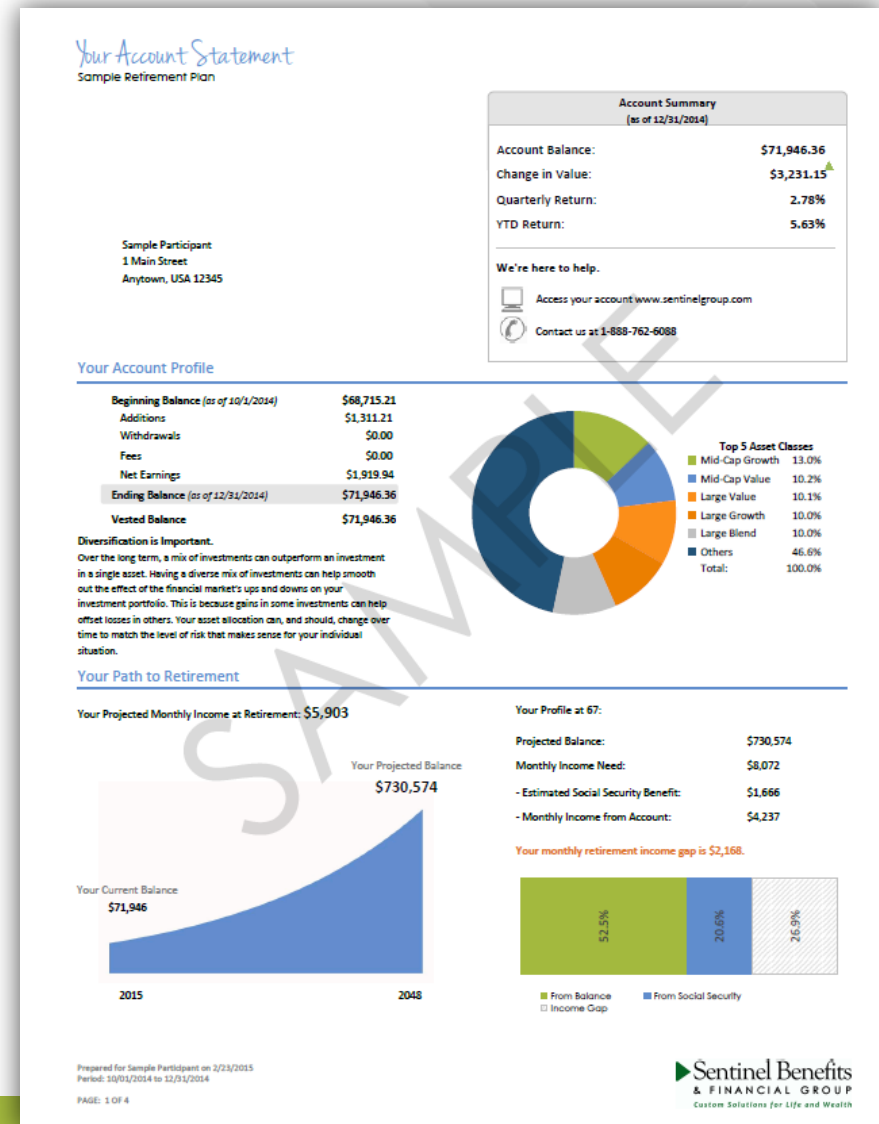
On-demand Reports



On-demand Reports

Participant Statements

- Participant Statement
- Participant Statement – Transaction Details



On-demand Reports

Plan Level Reports

- **Sentinel's Retirement Plan Overview**
- Plan Asset Summary
- Projected Eligibility Report
- Retirement Readiness by Participant



On-demand Reports

Payroll Reports

- **Combined Payroll Report – by Participant**
- **Deferral Changes – by Participant**
- **Hardship Deferral Suspension Report**
- **Summary of New Loans**

Combined Participant Changes Prepared for Sample 401(k) Plan Initiated from 03/01/2017 to 03/31/2017

Summary of Deferral Changes Initiated

SSN	Participant Name	Date/Time of Change	Deferral Type	Deferral Change
XXX-XX-1234	Sample Participant	03/08/2017 02:03 pm	Pre-Tax Deferral	3.00%
XXX-XX-1234	Sample Participant	03/08/2017 11:58 am	Pre-Tax Deferral	9.00%
XXX-XX-1234	Sample Participant	03/15/2017 11:08 am	Pre-Tax Deferral	\$100.00
XXX-XX-1234	Sample Participant	03/15/2017 11:59 am	Pre-Tax Deferral	4.00%
XXX-XX-1234	Sample Participant	03/15/2017 12:03 pm	Pre-Tax Deferral	4.00%
XXX-XX-1234	Sample Participant	03/16/2017 08:49 am	Pre-Tax Deferral	\$250.00
XXX-XX-1234	Sample Participant	03/17/2017 11:19 am	Pre-Tax Deferral	0.00%
XXX-XX-1234	Sample Participant	03/17/2017 11:20 am	Pre-Tax Deferral	0.00%
XXX-XX-1234	Sample Participant	03/20/2017 11:47 am	Pre-Tax Deferral	\$100.00
XXX-XX-1234	Sample Participant	03/30/2017 11:04 am	Pre-Tax Deferral	4.00%
XXX-XX-1234	Sample Participant	03/31/2017 09:40 am	Pre-Tax Deferral	\$110.00

Total Pre-Tax Deferral Requests: 11

Summary of New Loans Initiated

SSN	Participant Name	Eff Date	Loan ID	Payment Amount	Principal Amount	Principal Residence	# of Pmts	Payment Due Date
Semi-Monthly								
XXX-XX-1234	Sample Participant	03/16/2017	2	\$187.41	\$20,000.00	N	120	05/15/2017
XXX-XX-1234	Sample Participant	03/17/2017	6	\$67.00	\$7,150.00	N	120	05/15/2017
XXX-XX-1234	Sample Participant	03/21/2017	5	\$216.82	\$23,000.00	N	120	05/31/2017

Hardship Deferral Suspension Report

SSN	Participant Name	Deferral Suspension Start Date	Deferral Suspension End Date
-----	------------------	--------------------------------	------------------------------

There are no employees who should have deferrals suspended for this reporting period.

On-demand Reports

Loan Reports

- Loan Activity by Participant
- Loans Approaching Maturity
- Loans Paid Off
- Past Due Loan Payments - 30 days or more
- **Summary of Current Loans**

Summary of Current Loans Prepared for Sample 401(k) Plan As of 5/23/2017

Below is a listing of all current participant loans. If you have any questions about the loans listed please contact your Plan Consultant.

Origination Date	SSN	Name	Loan ID	Initial Amount	Interest Rate	Payment Amount	Payroll Frequency	Primary Residence	Beginning # of Payments	Current Balance*	Scheduled Maturity Date
6/14/2013	XXX-XX-1234	Sample Participant	2	\$13,937.00	5.25%	\$122.01	Bi-weekly	No	130	\$3,433.22	6/29/2018
8/12/2016	XXX-XX-1234	Sample Participant	3	\$8,500.00	5.50%	\$151.00	Bi-weekly	No	60	\$5,923.94	12/14/2018
4/7/2017	XXX-XX-1234	Sample Participant	2	\$31,354.95	6.00%	\$299.44	Bi-weekly	No	120	\$30,900.26	11/26/2021
5/19/2015	XXX-XX-1234	Sample Participant	2	\$5,050.00	5.25%	\$44.21	Bi-weekly	No	130	\$3,224.80	5/29/2020
8/19/2015	XXX-XX-1234	Sample Participant	1	\$1,860.00	5.25%	\$16.29	Bi-weekly	No	130	\$1,283.86	9/4/2020
2/9/2017	XXX-XX-1234	Sample Participant	1	\$7,958.00	5.75%	\$70.51	Bi-weekly	No	130	\$7,638.78	2/18/2022
7/13/2015	XXX-XX-1234	Sample Participant	2	\$25,000.00	5.25%	\$218.85	Bi-weekly	No	130	\$16,707.76	7/24/2020
5/15/2012	XXX-XX-1234	Sample Participant	1	\$10,000.00	5.25%	\$37.08	Bi-weekly	Yes	390	\$7,514.21	5/21/2027
6/30/2015	XXX-XX-1234	Sample Participant	1	\$8,200.00	5.25%	\$71.79	Bi-weekly	No	130	\$5,419.09	7/10/2020
9/1/2016	XXX-XX-1234	Sample Participant	4	\$16,100.00	5.50%	\$141.79	Bi-weekly	No	130	\$14,237.21	9/17/2021
2/16/2016	XXX-XX-1234	Sample Participant	2	\$7,000.00	5.50%	\$61.65	Bi-weekly	No	130	\$5,500.86	3/5/2021
3/3/2017	XXX-XX-1234	Sample Participant	3	\$7,283.16	5.75%	\$64.53	Bi-weekly	No	130	\$7,088.83	3/18/2022

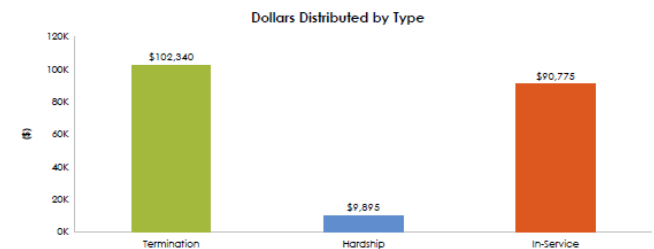
On-demand Reports

Distribution Reports

- Distribution Forfeiture Summary
(NEW)
- Distribution Payment Summary
- Distribution Summary

Distribution Summary - by Participant Prepared for Sample 401(k) Plan From 10/01/2016 to 09/30/2017

SSN	Participant Name	Retirement / Termination*	In-Service	Hardship	Total
Active					
XXXXXX-1234	Sample Participant	0.00	(37,925.00)	0.00	(37,925.00)
XXXXXX-1234	Sample Participant	0.00	(32,925.00)	0.00	(32,925.00)
XXXXXX-1234	Sample Participant	0.00	(19,925.00)	0.00	(19,925.00)
XXXXXX-1234	Sample Participant	0.00	0.00	(3,846.25)	(3,846.25)
XXXXXX-1234	Sample Participant	(74,277.67)	0.00	0.00	(74,277.67)
Active Total:		(\$74,277.67)	(\$90,775.00)	(\$3,846.25)	(\$168,898.92)
Inactive					
XXXXXX-1234	Sample Participant	(4,942.71)	0.00	0.00	(4,942.71)
XXXXXX-1234	Sample Participant	(1,735.56)	0.00	0.00	(1,735.56)
XXXXXX-1234	Sample Participant	(15,423.66)	0.00	0.00	(15,423.66)
XXXXXX-1234	Sample Participant	(7,467.44)	0.00	(4,541.72)	(12,009.16)
Inactive Total:		(\$29,569.37)	\$0.00	(\$4,541.72)	(\$34,111.09)
Plan Total:		(\$103,847.04)	(\$90,775.00)	(\$8,387.97)	(\$203,010.01)



* In addition to distributions applicable to Retirement or Termination, this column may include Required Minimum Distributions.

On-demand Reports

Data Export Reports

- **Deferral Rates by Participant (NEW)**
- Participant Demographic Data

Deferral Rates by Participant

Prepared for Sample 401(k) Retirement Plan

As of 5/24/2017

SSN	Name	YTD Def.	Met Eligibility Requirements	Deferral Type	Deferral %/\$	Effective Date	Deferral Election Source
XXX-XX-1234	Sample Participant	\$403.12	8/30/11	Pre-tax	3.00%	1/16/13	Census update
XXX-XX-1234	Sample Participant	\$248.04	11/30/16	Pre-tax	3.00%	4/1/16	Auto enrollment
XXX-XX-1234	Sample Participant	\$2,725.47	9/3/15	Pre-tax	10.00%	10/29/15	Participant web
XXX-XX-1234	Sample Participant	\$0.00		Pre-tax	3.00%	1/1/18	Auto enrollment
XXX-XX-1234	Sample Participant	\$900.00	4/24/02	Pre-tax	\$100.00	9/16/13	CSR
XXX-XX-1234	Sample Participant	\$332.82	10/31/15	Pre-tax	3.00%	1/1/16	Auto enrollment
XXX-XX-1234	Sample Participant	\$453.51	7/26/13	Pre-tax	\$50.39	5/26/15	CSR
XXX-XX-1234	Sample Participant	\$0.00			Deferral rate unavailable		
XXX-XX-1234	Sample Participant	\$8,937.45	5/18/99	Pre-tax	\$993.05	1/23/13	CSR

On-demand Reports

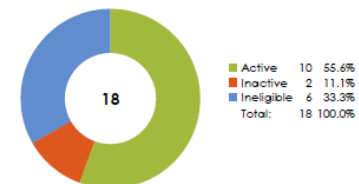
Employee Census Reports

- **Employee Census – by Plan Status**
- Summary of Eligible Employees

Employee Census - by Plan Status Prepared for Sample 401(k) Plan From 1/1/2017 - 5/23/2017

SSN	Employee Name	Birth Date	Hire Date	Entry Date	Total Compensation	Hours	Officer	Status	Status Date
Active									
XXX-XX-1234	Sample Participant	01/01/1900	01/01/1900	12/27/2007	\$80,004.91	0	N		
XXX-XX-1234	Sample Participant	01/01/1900	01/01/1900	07/01/2002	\$79,909.15	0	Y		
XXX-XX-1234	Sample Participant	01/01/1900	01/01/1900	06/02/2016	\$15,098.12	0	N		
XXX-XX-1234	Sample Participant	01/01/1900	01/01/1900	07/01/2013	\$17,119.28	0	N		
XXX-XX-1234	Sample Participant	01/01/1900	01/01/1900	01/01/2017	\$12,494.00	0	N	Rehire	01/01/2017
XXX-XX-1234	Sample Participant	01/01/1900	01/01/1900	04/01/2016	\$8,480.00	0	N		
XXX-XX-1234	Sample Participant	01/01/1900	01/01/1900	01/01/2000	\$45,769.20	0	Y		
XXX-XX-1234	Sample Participant	01/01/1900	01/01/1900	01/01/2007	\$407,385.47	0	N	Rehire	07/20/2009
XXX-XX-1234	Sample Participant	01/01/1900	01/01/1900	12/27/2007	\$19,701.91	0	N		
XXX-XX-1234	Sample Participant	01/01/1900	01/01/1900	06/08/2016	\$24,692.40	0	N		
Inactive									
XXX-XX-1234	Sample Participant	01/01/1900	01/01/1900	01/01/2006	\$4,267.49	0	N	Term'd	01/01/2017
XXX-XX-1234	Sample Participant	01/01/1900	01/01/1900	04/01/2013	\$6,332.62	0	N	Term'd	05/29/2015
Ineligible									
XXX-XX-1234	Sample Participant	01/01/1900	01/01/1900		\$8,514.76	0	N		
XXX-XX-1234	Sample Participant	01/01/1900	01/01/1900		\$0.00	0	N	Term'd	08/31/2016
XXX-XX-1234	Sample Participant	01/01/1900	01/01/1900		\$9,925.06	0	N		
XXX-XX-1234	Sample Participant	01/01/1900	01/01/1900		\$16,626.15	0	N		
XXX-XX-1234	Sample Participant	01/01/1900	01/01/1900		\$1,200.00	0	N	Term'd	03/20/2017
XXX-XX-1234	Sample Participant	01/01/1900	01/01/1900		\$0.00	0	N	Term'd	10/14/2016
Total:					18 Employees		\$787,520.52		

Employees by Status Category



On-demand Reports

Beneficiary Reporting

- **Beneficiary Management Report**
- **Participant Beneficiary Confirmation(s)**

Demonstration Model 401(k) Plan

Beneficiary Designations by Participant

(Report only includes participants with an account balance)

Active Participants

No Beneficiary Information Provided to Sentinel

SSN	Participant Name	Marital Status
XXX-XX-0000	Thomas Anderson	Unmarried
XXX-XX-9988	Thomas Jefferson	Not Provided
XXX-XX-1234	John Smith	Married

Beneficiary Information Provided to Sentinel

SSN	Participant Name	Marital Status	Last Online Update	Signatures Required?
XXX-XX-5342	Jane Adams	Married	12/29/2014	No
Ben #	Type	Ben Name	Relationship	Percent
1	Primary	John Adams	Spouse	100%
XXX-XX-1238	Terry Burns	Married	11/21/2014	Yes
Ben #	Type	Ben Name	Relationship	Percent
1	Primary	Jenny Burns	Spouse	80%
2	Primary	Johnny Burns	Child	10%
3	Primary	Judy Burns	Child	10%
XXX-XX-2233	Barbara King	Unmarried	12/17/2014	No
Ben #	Type	Ben Name	Relationship	Percent
1	Primary	Jack Spensor	Non-Spouse	100%
XXX-XX-6642	John Locksmith	Married	2/23/2015	No
Ben #	Type	Ben Name	Relationship	Percent
1	Primary	Jane Locksmith	Spouse	100%
2	Contingent	John Locksmith, Jr.	Child	100%
XXX-XX-6123	Donald Paper	Married		Yes
Ben #	Type	Ben Name	Relationship	Percent
1	Primary	Joan Paper		100%

Additional Reports

- **Account Balance Reports**
 - Account Activity by Fund
 - Account Activity by Source
 - Summary of Participant Balances
- **Fee Reports**
 - Fee Transactions by Participant
 - Redemption Fees – by Fund and Participant
- **Auto Enrollment** *(if applicable)*
 - Auto Enrollment: Approaching Eligibility
 - Auto Enrollment: Status of Enrollees

Account Activity by Fund - by Participant Prepared for Sample 401(k) Plan From 10/01/2016 to 09/30/2017

	Beginning Balance	Contributions	Forfeitures	Net Earnings	Loan Pmts. Transfers	Distributions	Ending Balance
XXX-XX-4144 Sample Participant							
American Beacon Lg Cap Value Inv	8,286.58	422.67	0.00	1,099.85	0.00	0.00	9,809.10
BlackRock Strategic Income Opps Inst	12,044.40	442.47	0.00	361.45	0.00	0.00	13,088.92
Fidelity® Total Bond	17,634.17	929.89	0.00	59.13	0.00	0.00	18,623.19
Hartford Small Cap Growth Y	708.31	33.82	0.00	89.31	0.00	0.00	831.44
JHancock Disciplined Value Mid Cap I	4,363.54	219.81	0.00	441.29	0.00	0.00	5,024.64
John Hancock Income R2	11,378.09	408.47	0.00	74.48	0.00	0.00	12,061.24
Lord Abbett Short Term Duration Inc. R4	16,490.50	894.11	0.00	181.18	0.00	0.00	17,567.79
Parnassus Core Equity Institutional	8,906.10	422.64	0.00	635.91	0.00	0.00	9,964.67
Prudential Global Real Estate Z	6,516.94	338.19	0.00	(110.06)	0.00	0.00	6,545.07
T. Rowe Price Mid-Cap Growth	4,311.72	219.81	0.00	586.23	0.00	0.00	5,087.76
T. Rowe Price New America Growth	8,378.68	422.67	0.00	1,523.03	0.00	0.00	10,324.38
Vanguard Market Neutral Funds Investor	5,954.31	338.13	0.00	29.55	0.00	0.00	6,351.99
Vanguard Total Int'l Stock Index Admiral	9,640.24	490.32	0.00	1,211.69	0.00	0.00	11,342.25
Westcore Plus Bond	12,103.46	642.48	0.00	(8.55)	0.00	0.00	12,737.39
William Blair Small Cap Value I	2,714.09	135.27	0.00	279.22	0.00	0.00	3,128.58
Total	\$128,980.33	\$4,762.97	\$0.00	\$6,413.91	\$0.00	\$0.00	\$142,057.21


XXX-XX-4038 Sample Participant




American Beacon Lg Cap Value Inv	2,720.91	633.97	0.00	349.61	(1,808.95)	0.00	1,895.54
Fidelity® Total Bond	1,319.18	314.99	0.00	9.56	(703.42)	0.00	942.61
Hartford Small Cap Growth Y	2,017.96	443.78	0.00	228.90	(1,344.27)	0.00	1,346.37
JHancock Disciplined Value Mid Cap I	2,204.27	507.17	0.00	221.98	(1,426.39)	0.00	1,507.03
John Hancock Income R2	520.82	126.79	0.00	5.09	(275.65)	0.00	377.05
Loan Fund	4,132.03	0.00	0.00	93.20	(1,703.74)	0.00	2,521.49
Lord Abbett Short Term Duration Inc. R4	778.94	190.20	0.00	9.68	(414.70)	0.00	564.12
Parnassus Core Equity Institutional	2,726.45	633.98	0.00	204.31	(1,664.74)	0.00	1,900.00
Prudential Global Real Estate Z	1,824.04	443.79	0.00	(8.20)	(945.54)	0.00	1,311.49
T. Rowe Price Mid-Cap Growth	2,178.16	507.17	0.00	261.67	(1,385.06)	0.00	1,561.94
T. Rowe Price New America Growth	2,780.23	633.97	0.00	483.36	(1,893.81)	0.00	1,973.75
Vanguard Market Neutral Funds Investor	1,975.63	507.18	0.00	16.40	(1,046.08)	0.00	1,454.13
Vanguard Target Retirement 2035 Inv	0.00	175.00	0.00	524.90	18,486.46	0.00	19,186.36
Vanguard Total Int'l Stock Index Admiral	4,085.29	950.94	0.00	491.48	(2,573.28)	0.00	2,945.43
William Blair Small Cap Value I	1,947.27	443.76	0.00	201.34	(1,301.83)	0.00	1,290.54
Total	\$31,192.18	\$4,614.49	\$0.00	\$3,093.58	\$0.00	\$0.00	\$40,900.45

XXX-XX-3144 Sample Participant


American Beacon Lg Cap Value Inv	145.07	407.64	(52.13)	26.69	(283.40)	(243.87)	0.00
Fidelity® Total Bond	71.10	203.82	(26.01)	3.01	(130.23)	(121.69)	0.00
Hartford Small Cap Growth Y	103.88	285.29	(37.28)	22.71	(200.35)	(174.25)	0.00
JHancock Disciplined Value Mid Cap I	116.61	326.07	(41.53)	19.40	(224.09)	(194.46)	0.00
John Hancock Income R2	28.18	81.53	(10.37)	0.90	(51.71)	(48.53)	0.00
Lord Abbett Short Term Duration Inc. R4	42.38	122.28	(15.52)	0.68	(77.20)	(72.42)	0.00
Parnassus Core Equity Institutional	144.40	407.59	(52.18)	21.36	(277.02)	(244.15)	0.00
Prudential Global Real Estate Z	95.91	285.30	(36.40)	9.10	(156.68)	(170.28)	0.00


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Report Name 

Filter value



CLEAR RESULTS

Report Name	Report Group	Employer	Created	Last Viewed	From	To	 Delete
81002-002-Census Verifi...	None	Web Demo Employer	12/24/2016				
Annual Participant Notic...	None	Web Demo Employer	11/08/2016				
Beneficiary Election For...	None	Web Demo Employer	05/22/2017				
Distribution Request Inst...	None	Web Demo Employer	05/22/2017				
Loan Payoff Instructions...	None	Web Demo Employer	05/22/2017				
Loan Policy.PDF	None	Web Demo Employer	10/25/2016				
Plan Highlight.PDF	None	Web Demo Employer	05/19/2017				
Retirement Plan Educati...	None	Web Demo Employer	05/19/2017				
Rollover Form.PDF	None	Web Demo Employer	05/22/2017				
Sentinel Benefits Group...	None	Web Demo Employer	05/19/2017				
Sentinel Benefits Group...	None	Web Demo Employer	05/01/2017				


Sentinel Pension Adviso...

None

Web Demo Employer

05/28/2016

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Sentinel Plan Descripti...

None

Web Demo Employer

01/13/2017

ABP

100%

Viewing Reports & Forms

Participant Statement	Participant Statements	Web Demo Employer	05/16/2017	05/16/2017	01/01/2017	04/30/2017	<input type="checkbox"/> Delete
Past Due Loan Payments...	Loan Reports	Web Demo Employer	04/30/2017	04/30/2017	01/01/2017	04/30/2017	<input type="checkbox"/> Delete
Past Due Loan Payments...	Loan Reports	Web Demo Employer	01/31/2017	03/30/2017	01/01/2017	01/31/2017	<input type="checkbox"/> Delete
Past Due Loan Payments...	Loan Reports	Web Demo Employer	10/31/2016	10/31/2016	01/01/2016	10/31/2016	<input type="checkbox"/> Delete
Past Due Loan Payments...	Loan Reports	Web Demo Employer	07/31/2016	07/31/2016	01/01/2016	07/31/2016	<input type="checkbox"/> Delete
Past Due Loan Payments...	Loan Reports	Web Demo Employer	04/30/2016	04/30/2016	01/01/2016	04/30/2016	<input type="checkbox"/> Delete
Participant Statement	Participant Statements	Web Demo Employer	04/07/2016	04/07/2016	10/01/2015	12/31/2015	<input checked="" type="checkbox"/> Delete
Participant Statement	Participant Statements	Web Demo Employer	04/07/2016	04/07/2016	01/01/2016	03/31/2016	<input type="checkbox"/> Delete
Past Due Loan Payments...	Loan Reports	Web Demo Employer	01/31/2016	01/31/2016	01/01/2016	01/31/2016	<input type="checkbox"/> Delete
Past Due Loan Payments...	Loan Reports	Web Demo Employer	10/31/2015	10/31/2015	01/01/2015	10/31/2015	<input type="checkbox"/> Delete
Past Due Loan Payments...	Loan Reports	Web Demo Employer	07/31/2015	07/31/2015	01/01/2015	07/31/2015	<input type="checkbox"/> Delete
Past Due Loan Payments...	Loan Reports	Web Demo Employer	04/30/2015	07/10/2015	01/01/2015	04/30/2015	<input type="checkbox"/> Delete
Past Due Loan Payments...	Loan Reports	Web Demo Employer	01/31/2015	01/31/2015	01/01/2015	01/31/2015	<input type="checkbox"/> Delete
Past Due Loan Payments...	Loan Reports	Web Demo Employer	10/31/2014	05/08/2015	01/01/2014	10/31/2014	<input type="checkbox"/> Delete
Past Due Loan Payments...	Loan Reports	Web Demo Employer	07/31/2014	07/31/2014	01/01/2014	07/31/2014	<input type="checkbox"/> Delete
Past Due Loan Payments...	Loan Reports	Web Demo Employer	04/30/2014	04/30/2014	01/01/2014	04/30/2014	<input type="checkbox"/> Delete
Past Due Loan Payments...	Loan Reports	Web Demo Employer	01/31/2014	03/13/2014	01/01/2014	01/31/2014	<input type="checkbox"/> Delete
Past Due Loan Payments...	Loan Reports	Web Demo Employer	10/31/2013	03/13/2014	01/01/2013	10/31/2013	<input type="checkbox"/> Delete
Sentinel Benefits Group...	None	Web Demo Employer	09/24/2013	05/19/2017			
Sentinel Benefits Group...	None	Web Demo Employer	09/24/2013	07/08/2015			
Past Due Loan Payments...	Loan Reports	Web Demo Employer	07/31/2013	07/31/2013	01/01/2013	07/31/2013	<input checked="" type="checkbox"/> Delete
Employee Census	Account Balance Reports	Web Demo Employer	11/16/2010	03/11/2013	10/01/2010	12/31/2010	
Employee Census	Account Balance Reports	Web Demo Employer	11/16/2010	01/30/2012	01/01/2010	12/31/2010	

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Questions?

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