

Third Party Retirement Plan Administrator's Value

www.rolloversystems.com

About RolloverSystems, LLC »

RolloverSystems, LLC (RSI) is America's only independent fully-integrated platform designed to manage and execute end-to-end terminated participant services for retirement plan sponsors. Founded in 2001, Charlotte based RSI works with more than 7,000 retirement plan clients, containing over 850,000 participants and processes \$1B in participant transactions annually. Our team of licensed Retirement Center counselors provides assistance to terminated participants of all balance sizes with education, access to objective investment choices, and transaction facilitation. RSI also specializes in plan termination assistance, automatic rollover (ARO) and missing participant services.

Benefit Spotlight »

» Broaden terminated participant services

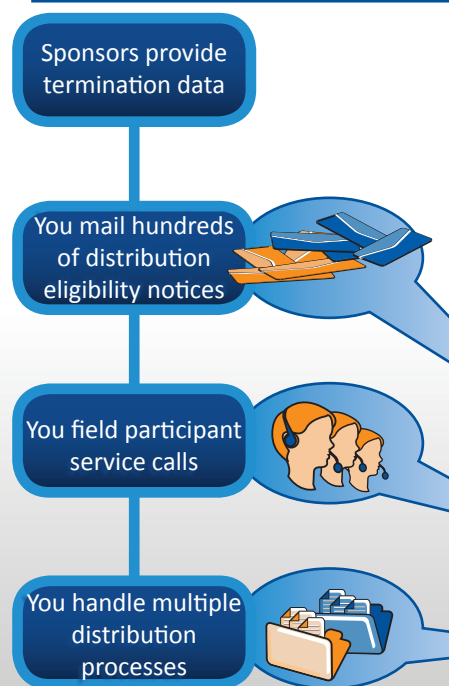
- Automated Rollover (ARO) and Safe Harbor IRA setup through RSI's platform
- Outsourced solution for participant distributions, questions and education via RSI call center and website
- Missing participant services and DOL compliant outreach
- Pre-filled distribution forms and scheduled participant follow up via RSI's licensed Counselors

» Streamline the distribution process

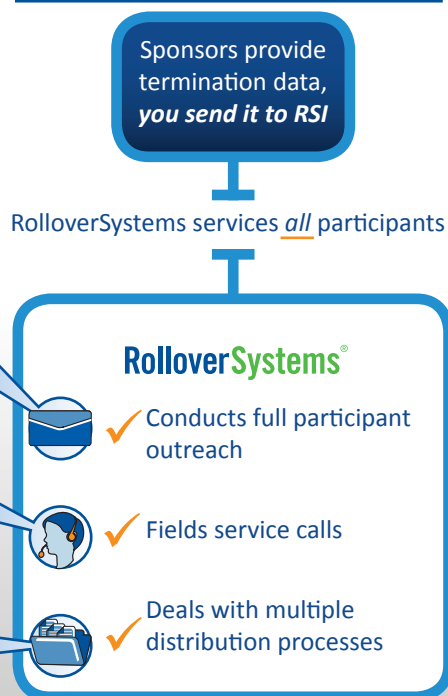
- Outsourced solution for participant notifications and ongoing outreach
- Simplified distribution processing across multiple providers
- Improved accuracy and completeness of executed distribution forms

Operational Process »

» Before



» After



Next Steps »

» Planning call

- Discuss your program options and distribution processes
- Identify critical questions and key personnel

» Plan activation

- Your road map to success through rapid plan implementation
- RolloverSystems provides all resources

» Wrap-up call

- RolloverSystems provides updates as plans come on-line
- Address any outstanding deliverables
- Activate all rollover services