



OVERVIEW OF BLUE PRAIRIE GROUP'S PLAN BENCHMARKING SERVICES

1) Advisory Firm Benchmark Report

We benchmark over 30 services typically provided by advisory firms to assess the reasonableness of their fees. The five areas include:

- » Fiduciary Status
- » Investment Services
- » Vendor Management
- » Plan Management
- » Participant Services

If your plan is receiving more services, a greater volume of services, or services that have a higher degree of difficulty, it might be reasonable to expect a higher cost structure. In addition, we will evaluate the current fee structure to determine if it's appropriate for a plan of your size.

2) Recordkeeper Benchmark Report

Utilizing third-party data that contains plan information on over 100,000 retirement plans, we can build a custom peer group of at least 25 plans, ten different recordkeepers and three different business models to provide you with an accurate assessment of your plan fees and services. Specifically, we will evaluate:

- » Recordkeeping Services
- » Administrative Services
- » Compliance and Consulting Services
- » Communication and Education Services



In addition, we examine the value of the services being delivered by your recordkeeper to both you as the plan sponsor and to your participants. For you as a plan sponsor, we provide insights regarding:

- » Service Quality
- » Support Services
- » Plan Design Assistance

For your participants, we compare the “Participant Success Measures” for your plan versus other plans in your industry. We also project the difference in total account balances at retirement versus a “typical” plan in your industry, assuming all participants are “average.”

3) Investment Benchmark Report

We will look at key elements that drive successful investment menu design by comparing your investment lineup to a custom peer group. Specifically, we will evaluate:

- » Investment Menu Design and Diversification
- » Use of Active vs. Passive Managers
- » Share Class and Fee Review
- » Current Asset Allocation vs. Peers

In addition, we will provide an investment monitoring report that scores each of the funds in your lineup across 21 data points spanning multiple dimensions of operational, performance, risk-adjusted and risk metrics.

For more information or to order your reports, please contact Ty Parrish at 813.330.3377 or ty@blueprairiegroup.com and indicate which reports you would like to receive. We will provide you with a checklist of items that we need to complete the analysis.

