

providing helpful services for retirement plans

As a full service provider, we can provide a wide variety of services needed to help plan sponsors adopt and maintain a retirement plan. These services bring value by helping retain current employees while attracting outstanding talent—the key to a successful and growing business.

Services	Description
Plan Documents	Ameritas offers IRS approved documents required to sponsor a tax-qualified employer retirement plan.
Compliance	As a full service provider, Ameritas performs the day-to-day administrative functions that help plan sponsors maintain a tax-qualified retirement plan. This includes staying current on the required IRS regulations and Form 5500 reporting, as well as administrative duties, such as vesting calculation, eligibility calculations, distributions reporting, etc.
Recordkeeping	Ameritas provides individual and plan level account reporting and 24/7 transactional features to help participants manage their account based on their schedule through a plan website, pension benefit statements and our call center.
Fee Disclosure	We provide plan fiduciary fee disclosure at the time of engagement and when services change and we prepare plan participant fee disclosure for adoption by your plan administrator.
Annual Plan Review	This review provides basic information about the plan. Reports include, but are not limited to: participant deferral averages by age group, participation by age group and withdrawal activity which helps plan sponsors understand how their participants are taking advantage of this employee benefit.
Quarterly Investment Review	Detailed reports offer in-depth information about the investment platform selected by the plan sponsor. This helps in fulfilling the required due diligence, which is a key responsibility of the plan fiduciary.
Fiduciary Services/Tools	These services include a Fiduciary Resource Guide that details the plan fiduciary's responsibilities, Mesirow Financial 3(21) and 3(38) investment services, annual due diligence checklists and other tools that provide guidance for plan sponsors and administrators.



Services	Description
Participant Education	Our educational module – RetireFocus – provides videos, charts, tutorials and articles to help plan participants understand the value of their retirement plan and how they can use it to achieve their retirement savings goals.
24/7 Secure Account Access	Participants can access their account any time to learn about saving for retirement as well as managing their account based on their needs and level of involvement.
Investment Services	From selection to monitoring and reporting, Ameritas has a wide range of investment services to assist the plan sponsor in creating an investment platform that provide participants with a diversified, high-quality investment lineup.



**Ameritas Life Insurance Corp.
Retirement Plans Division**
5900 O Street
Lincoln, NE 68510
800-923-2732
ameritas.com

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