

Ameritas GPS services

Plan Services	Services include, but are not limited to: <ul style="list-style-type: none">• Daily account valuation/recordkeeping• Fee disclosure for plan fiduciary and plan participant• Annual plan review• Plan sponsor and plan participant support via our call center and secure website• Daily transactions available
Fiduciary Services	Both 3(21) and 3(38) fiduciary services are available through Mesirow Financial Investment Strategies.
Bundled/Unbundled Option	<p>Ameritas can provide all aspects of plan servicing including plan documentation, compliance and recordkeeping.</p> <p>Ameritas also has processes in place to seamlessly interface with Third Party Administrators who can provide plan design and document services while Ameritas provides the recordkeeping services.</p>
Website Access	A customized website is available that offers tools, resources and information for plan sponsors to administer the plan and for plan participants to manage their personal accounts.
Participant Statements	Statements are issued to plan participants quarterly via U.S. mail or online.
Asset Allocation Models	Five models - aggressive, capital growth, balanced, moderate and conservative - are available to help plan participants select appropriate allocations for their personal risk tolerance.
Education	Online educational resources are available on the secure website. The <i>RetireFocus</i> pages include articles, calculators and other tools to help guide plan participants as they save for retirement.
Investment Platform	The Ameritas GPS investment platform includes an expansive lineup consisting of mutual funds from a wide array of fund families.
Custodial Service	MG Trust is the custodian and all investment trades are settled and cleared by Matrix per Ameritas recordkeeping instructions.
Customer Service	A dedicated installation team and customer service consultant is assigned to each plan. A relationship manager is assigned to plans with assets exceeding \$2 million.





**Ameritas Life Insurance Corp.
Retirement Plans Division**

5900 O Street
Lincoln, NE 68510
800-923-2732
ameritas.com

**Ameritas Life Insurance Corp. of New York
Retirement Plans Division**

1350 Broadway, Suite 2201
New York, NY 10018
800-923-2732

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