



Prism365 Report

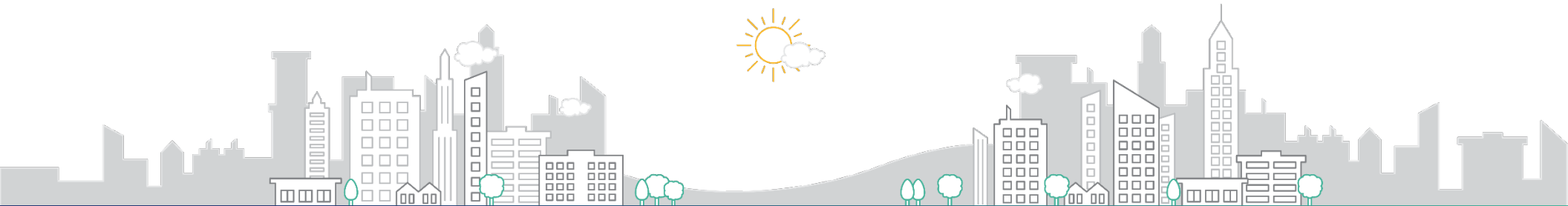
Retirement Advisor Fee and Service Benchmarking

Prepared For:



ABC Company

May 1, 2021



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Prism365 Compensation & Services Report

Benchmark Information	
Your Plan:	ABC Company
Plan Size:	\$3,750,000
Plan Size Band	\$2.5 million to \$5 million
Benchmark Universe:	2,426 plans

Core Services	Your Plan
Investment Menu Selection & Monitoring	Part of Base Fee
Frequency of Committee Meetings	Semi-Annually
3(21) Services	Part of Base Fee
3(38) Services	Additional Fee
Annual Fee Benchmarking	Part of Base Fee
Live-Bid/RFP	Part of Base Fee
Live-Bid/RFP Frequency	Every 3 years
Plan Committee Education and Training	Part of Base Fee
Fiduciary Process Review	Part of Base Fee
Fiduciary Process Review Frequency	Annually
Education / Enrollment Days	4
Fee for Additional Days	\$1,750
1-on-1 Employee Education/Consulting	Part of Base Fee
Financial Wellness Program	Proprietary System

Value Added Services

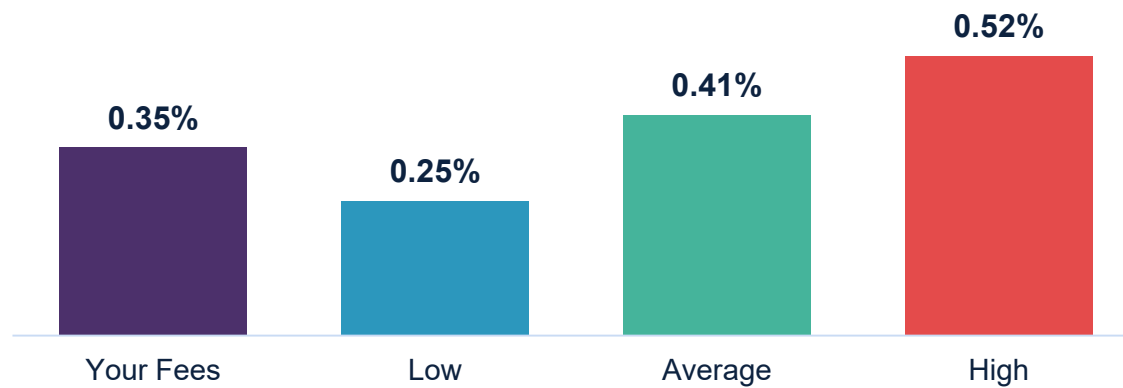
Additional Services	Part of FIRM NAME Services
Fiduciary governance program	✓
TDF fit analysis	✓
Stable value and cash equivalent analysis	
Former practicing ERISA attorney access	✓
Monthly newsletters/quarterly webinars	✓
Access to custom multi-manager TDFs	✓
Access to custom multi-glidepath TDFs	✓
3(38) discretionary investment management	✓
Financial wellness program with 1-on-1 guidance	✓
Access to low-cost CITs	✓
Online fiduciary document vault	✓
Quarterly legislative update	✓
Client advocacy	✓

Advisory Fees

Advisor Benchmark Universe

Advisor Fee	Your Plan		Low	Average	High
Current Advisory Fees	0.35%	\$13,125	0.25%	0.41%	0.52%

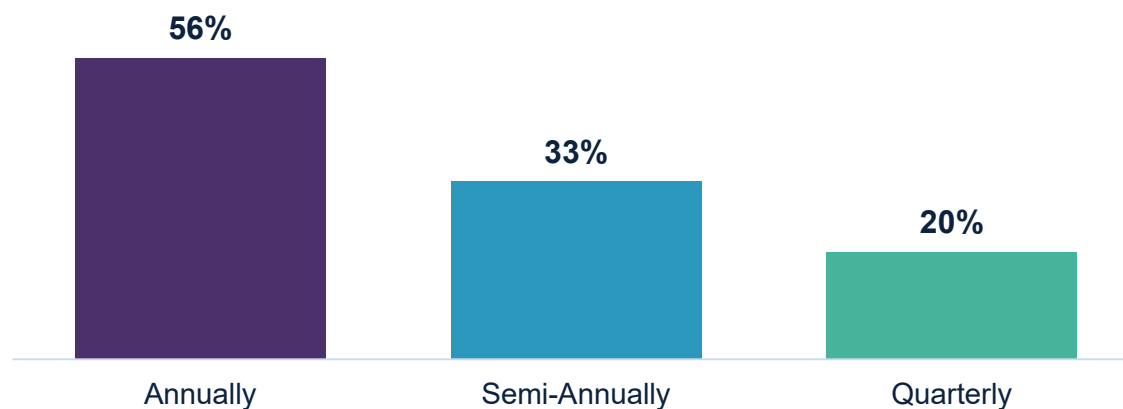
Table 1
Advisory Fees



Investment Due Diligence Services

	Your Plan	Advisor Benchmark Universe		
		Included as part of Base Fee	Additional Fee	Not Offered
Investment Analysis Services				
3(21) Services	Part of Base Fee	89%	8%	3%
3(38) Services	Additional Fee 0.03%	33%	38%	29%
Investment Menu Selection & Monitoring	Part of Base Fee	99%	1%	0%
Frequency of Committee Meetings	Semi-Annually	See Table 2 Below		

Table 2
Frequency of Investment Committee Meetings



Fee Benchmarking & Fiduciary Services

Advisor Benchmark Universe

	Your Plan	Included as part of Base Fee	Additional Fee	Not Offered
Provider & Fee Benchmarking				
Annual Fee Benchmarking	Part of Base Fee	85%	2%	13%
Live-Bid/RFP	Part of Base Fee	89%	7%	4%
Frequency of Live-Bid/RFP	Every 3 years	See Table 3 Below		
Fiduciary Services				
Plan Committee Education and Training	Part of Base Fee	93%	2%	5%
Fiduciary Process Review	Part of Base Fee	96%	2%	2%
Frequency of Fiduciary Process Review	Annually	See Table 4 Below		

Table 3
Frequency of Live-Bid/RFP

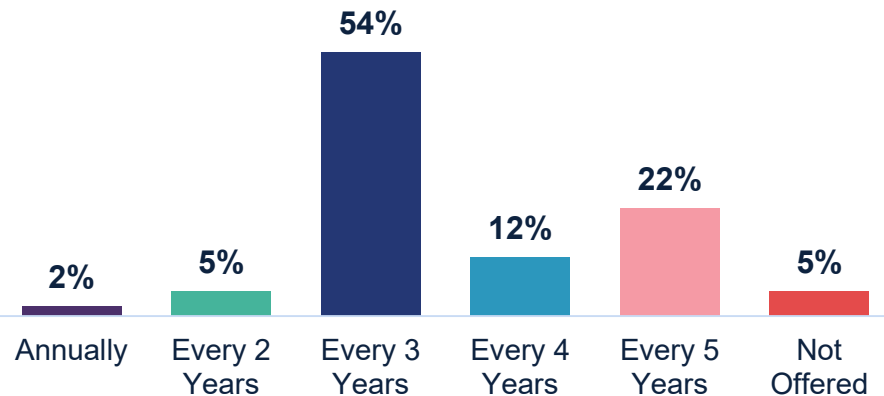
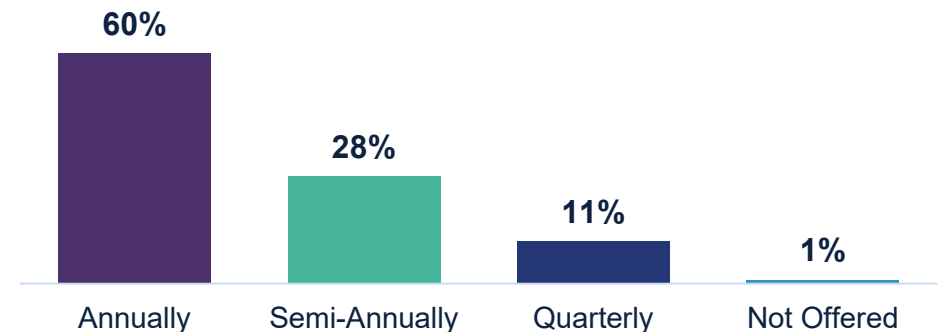


Table 4
Frequency of Fiduciary Process Review



Employee Engagement Services

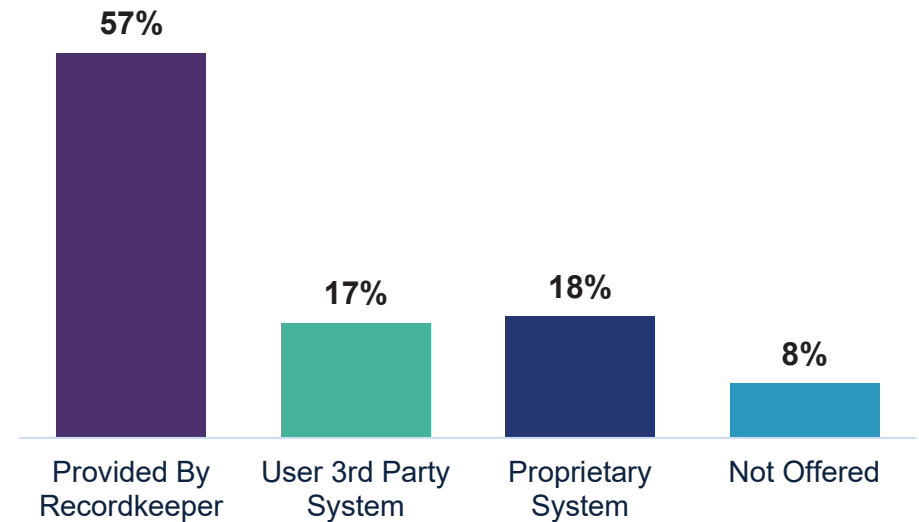
Advisor Benchmark Universe

	Your Plan	Included as part of Base Fee	Additional Fee	Not Offered
Employee Engagement Services				
1-on-1 Employee Education/Consulting	Part of Base Fee	82%	12%	7%
Education & Enrollment Days	Part of Base Fee	85%	2%	13%
Education Days Offered	4	See Table 5 Below		
Financial Wellness Program	Proprietary System	See Table 6 Below		

Table 5
Education Days Offered As Part of Base Fee



Table 6
Financial Wellness



Prism Fee Benchmarking Analysis

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ACR#3470853 03/21