



# Participant Success Measures

Participant Success Measures refers to 10 recognized industry statistics that measure how well a plan helps participants prepare for retirement. This page lists each of these 10 statistics and compares them to the Benchmark Group. Few areas are more central to reviewing fees from the perspective of "what you get for what you pay." Here, small changes can make big differences for participants.

Participant Success Measures	This Plan's Participant Success Measures vs. The Benchmark Group							Difference from Average
	% of Plans Measuring	This Plan	Low	Below Average	Average	Above Average	High	
Plan's Current Participation Rate	79%	-	35%	57%	75%	85%	95%	-
Average Deferral Percentage for Non-Highly Compensated Employees	61%	-	1.2%	3.5%	4.9%	6.4%	8.5%	-
Average Deferral Percentage for Highly Compensated Employees	54%	-	3.1%	5.6%	7.1%	8.5%	13.1%	-
% of Participants Maximizing Company Match	14%	-	42%	45%	66%	86%	89%	-
% of Plan Assets in Automatically Diversified Options*	100%	17%	6%	14%	19%	35%	51%	-2%
% of Eligible Participants Making Catch-up Contributions	14%	-	4%	4%	10%	18%	19%	-
% of Participants Using Auto-Rebalance Option	14%	-	4%	6%	25%	42%	44%	-
% of Terminated Participants NOT "Cashing Out"	21%	-	35%	49%	88%	92%	96%	-
% of Participants with a Personal Retirement Goal	0%	-	-	-	-	-	-	-
% of Participants On Track to Achieve That Goal	0%	-	-	-	-	-	-	-

\* Includes balanced funds, risk or target-based retirement choices, model portfolios, and managed accounts.

- = N/A or not available.

# of Participant Success Measures Average or Better	0 for 10	1 for 10	2 for 10	3 for 10	4 for 10	5 for 10	6 for 10	7 or more for 10
Percentage of Plans in Benchmark Group	25%	18%	21%	25%	7%	4%	0%	0%

## HOW DOES THE PLAN COMPARE

to the Benchmark Group with respect to these 10 important participant success measures?

- This plan ranks average or better in **0 out of 10** categories
- **NO PLAN** ranks lower than this plan
- **75%** of plans rank above this plan
- **NO PLAN** ranks average or better in more than 6 categories