



RETIREMENT COMMUNICATIONS SUITE

Retirement Solutions | Communications Suite

Overview

Today's rapidly changing marketplace for employer-sponsored retirement plans demands a steady and reliable source for providing important plan information and disclosures to plan participants and sponsors. The **Retirement Communications Suite from FIS** offers a fully integrated solution with Relius Administration to provide a secure, dynamic, and cost-effective solution for quality retirement communications.

Helping retirement plans of all sizes

Regardless of plan size, we can help clients get the most from participant and plan sponsor communications with highly configurable statements and fee disclosures. Our comprehensive offering includes on-demand participant and plan sponsor statements for either electronic delivery via the participant website or physical delivery by mail. The look and feel of the Retirement Communications integrates with the look and feel of Participant and Plan Sponsor Web.

This communications suite provides:

- Participant and Plan Sponsor statements
- Participant Fee disclosures (404(a)-5)
- Web presentment of investment data



Solution benefits

- Easy single vendor implementation.
- Fully integrated retirement income projections.
- Configurable and informative.
- Complimentary design to Relius Web.
- Meets legal and regulatory disclosure requirements.
- Ability to reduce costs, increase data security and streamline business operations.
- Communications are produced, printed and archived by FIS.

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Configurable design that is representative of the online experience

Full color options

Your Retirement Account Statement
Awesome 401(k) Plan
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Your Balance
\$1,331,982.34
As of 5/31/2016

Your 12 month Rate of Return 4.56%
Your Quarterly Return 2.56%
Your YTD Return 9.54%

Account Summary

Beginning Balance (as of 4/30/2016)	\$21,187.89
Additions	\$564.23
Withdrawals	-\$113.06
Gain/Loss	\$876.43
Ending Balance (as of 5/31/2016)	\$23,987.65
Vested Balance (as of 5/31/2016)	\$23,987.65

Investment Allocation Summary

U.S. Stocks	25%
International	20%
Balanced	25%
Other	30%

Projected Retirement Income

Projected Monthly Need: \$4,800

Monthly Income Gap	\$3,000
Projected Monthly Benefit from your Account	\$1,000
Projected Social Security Benefit	\$800

Integrated retirement income analysis

Contribution activity by source

Investment model friendly

Projected Retirement Income
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\$2,821 Projected income/mo.
51% of the way there!

Goal: \$5,000/mo.

Would you like to improve your retirement income projection? You can increase your monthly projected income from \$2,821 to \$3,100 by contributing an extra \$30 more each month.

Contribution Activity by Source - Option 1

	This Period	Year-to-Date
Deferral	333.33	333.33
Match	222.22	222.22
Profit Sharing	0.00	0.00
Total Contribution Activity	\$555.55	\$555.55

Contribution Activity by Source - Option 2

	This Period	Year-to-Date	Contributions-to-Date
Deferral	333.33	333.33	333.33
Match	222.22	222.22	222.22
Profit Sharing	0.00	0.00	0.00
Total Contribution Activity	\$555.55	\$555.55	\$555.55

Dynamic layout

Model Portfolios
Fund Performance View
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Short Term

Portfolio Description: The FIS Growth model attempts to provide for long-term growth of assets while providing moderate volatility. The model attempts to achieve this through diversification of plan assets among mutual funds primarily comprised of growth-oriented US and foreign stocks and no more than 20% in fixed income securities.

Fund Name	Ticker	Allocation %	3 Mo	1 Yr	3 Yr	5 Yr	10 Yr	Since Inception	Expense Ratio	
ALLIANZ OCC RENISSANCE C	PONCK	2.01%	0.51%	9.00%	12.69%	-2.61%	-2.61%	9.74%	12/28/16	9.74%
ALLIANZ OCC RENISSANCE C	BMCKC	5.03%	0.42%	6.60%	8.63%	1.61%	1.61%	5.72%	12/28/16	5.72%
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ALLIANZ OCC RENISSANCE C	BMCKC	5.03%	0.42%	6.60%	8.63%	1.61%	1.61%	5.72%	12/28/16	5.72%

Conservative Plan

Portfolio Description: The FIS Growth model attempts to provide for long-term growth of assets while providing moderate volatility. The model attempts to achieve this through diversification of plan assets among mutual funds primarily comprised of growth-oriented US and foreign stocks and no more than 20% in fixed income securities.

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ALLIANZ OCC RENISSANCE C	BMCKC	5.03%	0.42%	6.60%	8.63%	1.61%	1.61%	5.72%	12/28/16	5.72%

Growth Plan

Portfolio Description: The FIS Growth model attempts to provide for long-term growth of assets while providing moderate volatility. The model attempts to achieve this through diversification of plan assets among mutual funds primarily comprised of growth-oriented US and foreign stocks and no more than 20% in fixed income securities.

Fund Name	Ticker	Allocation %	3 Mo	1 Yr	3 Yr	5 Yr	10 Yr	Since Inception	Expense Ratio	
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For more information

For more information about FIS' Retirement Communications Suite, contact retirement.sales@fisglobal.com.