Standard 403(b) Plan Service

- 403(b) - Standard Record Keeping and Administrative Services Agreement
- Fund Performance Sheet – List of all available mutual funds in the plan

Overview of the 403b plan features:

- 187 Fidelity Investments No-Load Funds;* Fidelity All Funds Preformance Sheet
- $24/$20 Annual Retirement Fee: deducted 1/4th per quarter, per participant
- Online enrollment process: www.netbenefits.com/ready2enroll
- 24 hour account access via NetBenefits for Plan Participants; www.403b.com
- Fidelity Phone Representatives (800) 343-0860; 8am – 12 midnight ET
- No Plan Sponsor set up fees for new plans:
  - ✓ 10 participant accounts and $1m in eligible transfers/rollovers (min. requirement)
- Plan Sponsor Workstation: Reporting and Remittance access for plan administrators
- Fidelity recordkeeping features: https://workplace.fidelity.com/403b.html
- Dedicated Client Service Team for Plan Administrators (800) 868-1023; 8am - 6pm EST

We can provide enrollment kits for participant meetings. However, our resources do not allow for an in-person meeting contact. Our Phone Representatives can assist as needed with enrollment forms or with our easy online enrollment process when participants are ready to open accounts. Representatives are available until 12am midnight ET at (800) 343-0860.

The Plan Sponsor Service Team can be reached at (800) 868-1023 and can provide the standard agreements noted above and will work directly with you on all reporting/recordkeeping and remittance questions.