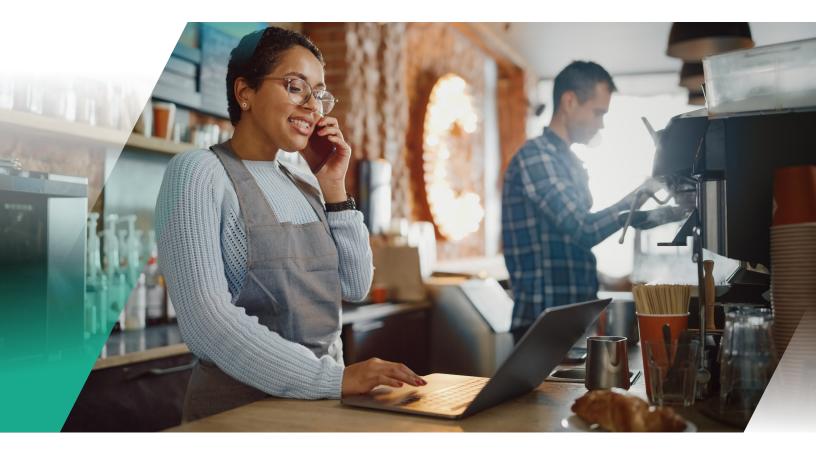


COPILOT FOR PLAN SPONSORS

A streamlined 401(k) retirement solution designed for small businesses



CoPilot is a simple, cost-effective 401(k) retirement plan that eases the administrative burden of offering a 401(k) plan to your employees. Through a clear, skillfully selected 401(k) plan design, CoPilot allows you to free up your time to focus on running your business.

- Straightforward, transparent pricing
- Low cost investment menus

- Automatic enrollment and increases
- Plan Health Report with customizable metrics

DESIGNED WITH YOU IN MIND

CoPilot saves you time, reduces investment fiduciary responsibility, and helps:

- Your business: Attract talent, retain employees, and maximize tax benefits. Read more about additional potential tax benefits that may be available to you through SECURE 2.0.
- Your participants: Auto-enroll gets employees started on the path to retirement readiness and increases plan participation rates.
- You as the plan sponsor: CoPilot monitors plan activity and provides you with a Plan Health Report and proactive messaging.



Save time and improve outcomes—CoPilot's online setup, enrollment, and payroll integration can save you time on administration and increase data accuracy.



Manage your risk—With research-based plan tools and education backed by a team of support specialists, a CoPilot 401(k) is designed to make retirement simpler and easier for you and your employees. CoPilot 401(k) plans offer investment fiduciary coverage* and services including professionally managed investment portfolios from Wilshire Associates, a national 3(38) investment manager provider.



Enhance your employees' financial wellness—We offer Financial Wellness, a holistic program created by Financial Finesse, that provides employees with free access to unbiased, personalized resources and guidance—including virtual financial coaching—to help them pursue financial well-being.



GOAL: OFFER A STREAMLINED, COST-EFFECTIVE SOLUTION

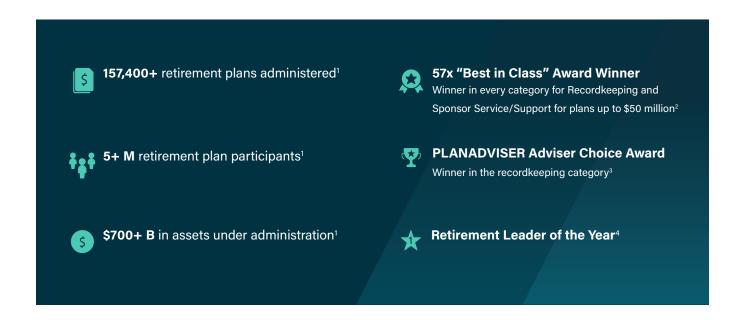
Optimized for	Organizations with less than 25 Employees or plans with under \$1 million in assets
Investment Options	Professionally Managed Portfolios* Individual Investments *5 Investment Allocation Models.
Pricing	Implementation Fee\$500
	Base fee\$125/month
	Recordkeeping Fee

Pricing is subject to change. Excludes investment expenses.

^{*}Investment fiduciary services are offered through Ascensus Investment Advisors, LLC a registered investment adviser.

A PARTNER YOU CAN TRUST

Ascensus is the largest independent recordkeeping services provider, third-party administrator, and government savings facilitator in the United States.



¹As of December 31, 2022.

²PLANSPONSOR. 2021 Defined Contribution (DC) Survey. January 2022.

Ascensus' award-winning service, technology, expertise, and the simple plan design of a CoPilot 401(k) makes offering your employees a retirement solution an easy decision.



833-893-3233



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³PLANADVISER. 2022 Retirement Plan Adviser Survey. February 2022.

⁴With Intelligence. With Intelligence Mutual Fund & ETF Awards. June 2022.