# Compare Our 401(k) Offering

The following are the resources and services PSA provides as part of our standard 401(k) offering.

Please compare our services to your current 401(k) Advisory firm by completing the following checklist:

## Plan-Level Investment Services

| PSA | Current Firm | |
|---|---|---|
| ☑ | ☐ | Serve as investment co-fiduciary |
| ☑ | ☐ | Review Plan's investment objectives |
| ☑ | ☐ | Assist in development of Investment Policy Statement |
| ☑ | ☐ | In-house investment monitoring and reporting |
| ☑ | ☐ | Review Qualified Default Investment Alternative (QDIA) and Target Date Funds (TDFs) |

## Participant-Level Services

| PSA | Current Firm | |
|---|---|---|
| ☑ | ☐ | Provide investment education to participants |
| ☑ | ☐ | General financial and retirement planning information |
| ☑ | ☐ | Interactive investment materials |
| ☑ | ☐ | Develop participant education and communication strategy |
| ☑ | ☐ | Render participant advice |
| ☑ | ☐ | One-on-one participant meetings and teleconferences |

## Plan Operation-Related Services

| PSA | Current Firm | |
|---|---|---|
| ☑ | ☐ | Attend plan committee meetings |
| ☑ | ☐ | Provide fiduciary education to Plan committee |
| ☑ | ☐ | Develop and maintain fiduciary file |
| ☑ | ☐ | Review ERISA Section 404(c) compliance |
| ☑ | ☐ | Analyze and assist with plan design |
| ☑ | ☐ | Provide ongoing support for Plan operation |

## Provider Oversight-Related Services

| PSA | Current Firm | |
|---|---|---|
| ☑ | ☐ | Monitor administrative service providers |
| ☑ | ☐ | Periodic benchmarking of fees, services, and investments |
| ☑ | ☐ | Generate and evaluate service provider requests for proposal (RFPs) |
| ☑ | ☐ | Support contract negotiations with administrative service providers |
| ☑ | ☐ | Provide service provider transition and/or plan conversion support |
| ☑ | ☐ | Monitor administrative service providers |

## Contact us for a complimentary second opinion on any of the services listed above:


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