

Plan Reports for Employers

Our Goal is Simple:

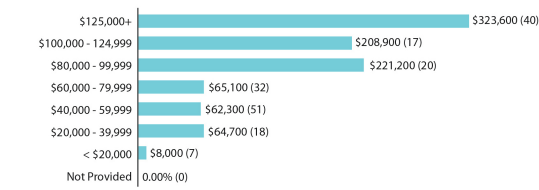
We want to create the opportunity for everyone to pursue financial well-being. And we believe that having access to plan information is essential to helping you and your employees pursue that financial well-being.

Employers can access their plan’s quarterly health report as soon as it is posted to their plan’s [website](#).

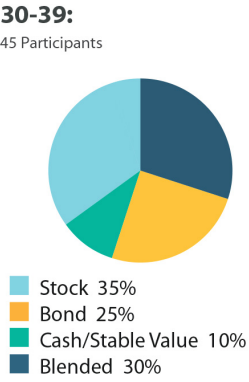
Benefits and solutions of the Security Benefit plan health report:

	Comparison Period as of 12/31/2017	Your Plan as of 9/30/2018	Benchmark*
Total Plan Assets	\$27,452,500	\$27,673,200	—
Active Participants	145	150	—
Average Account Balance	\$140,000	\$114,600	\$131,355
Investments Offered	25	23	20
Investments with a Balance	18	18	—
Average Number of Investment Options Held	3.7	3.3	—

* Benchmark values presented are based on the Plan Sponsor Council of America’s (PSCA) 60th Annual Survey of Profit Sharing and 401(k) Plans, representing 2016.



- Data-driven insights to help identify changes that may improve your plan participation and plan design
- A benchmark visual to help you rank your plan features against similar plans
- A quarterly asset and participation comparison to help illustrate growth or decline in participation
- Demographics to show participation, average account balance, and average contribution by age, compensation, tenure, and gender
- Loan information which will detail the number and balance of outstanding loans by participant age groups
- Investment allocations by participant age group, as well as high level transaction activity by investment



We encourage you to take advantage of this tool on a quarterly basis — to review your plan’s health and to determine if an updated strategy might be necessary to improve its participation or design.

- [Plan Health Report Example](#)

If you have questions or require additional online access for another plan representative, please contact our Service Center at 800.747.3942.

Related Products

- [SFR Program](#)
- [SecurePoint Retirement Program](#)
- [Workplace Retirement Program for ERISA Plans](#)
- [Workplace Retirement Program for Non-ERISA Plans](#)

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