

★ Whats New   ✨ Customize Your Dashboard

ABC Employer Name Retirement Plan (12345) DC  
Subplans

**\$1,856,457,089.02**

Plan Balance as of 02/04/20XX

**\$57,089.02**

Average Account Balance as of 02/04/20XX

**\$44,089.02**

Average Loan Balances as of 02/04/20XX

Plan Health 360



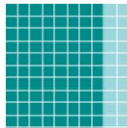
Notifications

- Payroll File Pending (12)
- Hardship Withdrawal (22)
- Participant Transactions (2)
- Financial Wellness Models (8)
- Item Five (12)
- Item Six (2)
- Service Center Request (85)
  - Response Required (5)
  - Open (2)
  - In Progress (23)
- Reports (5)
  - Expiring Soon (2)
  - Actions Required (3)

On Track to Replace Retirement Income

**80%**

as of 01/31/20XX

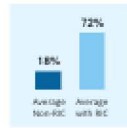


[View Details](#)

Average Income Replacement

**45%**

as of 01/31/20XX

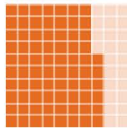


[View Details](#)

Participation Rate

**76%** ↑ 3%

as of 01/31/20XX

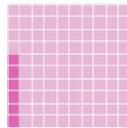


[View Details](#)

Average Contribution Rate

**6%**

Prudential Average: 6%  
as of 01/31/20XX



[View Details](#)

Sponsor Center Users

- John Consigli
- Karen B Spring
- Lisa McCarthy

To Do's

For me

- I need to go to the bank today
- Add Plan Representative

For Team

- Remove Sponsor Center User
- Upload Payroll File

Recent Activity

Transaction   Participant   Plans   Users   Activities

Transaction Type	Date	Value
Contribution	02/21/20XX	\$2,345.99
Hardship	02/12/20XX	\$1,789.24
Termination	02/11/20XX	N/A

Goals as of 01/31/20XX

Reduce Cost

- ✓ Prospective or Retrospective Auto Enrollment
- + eEnrollment material [Get Started](#)
- + Defined Contribution Optimization [Get Started](#)

- Payroll
- Reports
- Service Center
- Participant Inquiry
- Investments
- Document Repository
- Compliance
- Plan Permissions

ABC Employer Name Retirement Plan (123456) DC Subplans

\$1,856,457,089.02

Plan Balance as of 02/04/20XX

\$57,089.02

Average Account Balance as of 02/04/20XX

\$44,089.02

Average Loan Balances as of 02/04/20XX

Plan Health 360



Your Rock Solid Score as of 05/01/20



Prudential Average by Industry

What does your score mean? Your Rock Solid Score measures the overall health of your plan on a scale of 1 to 100, based on several key factors that lay the foundation for long-term financial security. [Find out more](#)

Key Insights

- Average employee savings rates are 5.6%
- Automatic in-plan guaranteed income option exists
- Contribution escalation maximum under 10%
- Less than 85% of eligible employees are enrolled

Next Steps to Improve Your Plan's Health

Notifications

- Payroll File Pending (12)
- Hardship Withdrawal (22)
- Participant Transactions (2)
- Financial Wellness Models (6)
- Item Five (17)
- Item Six (22)
- Service Center Request (65)
  - Response Required (5)
  - Open (27)
  - In Progress (33)
- Reports (5)
  - Expiring Soon (2)
  - Actions Required (3)

On Track to Replace Retirement Income

80%

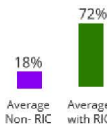
as of 01/31/20XX



Average Income Replacement

45%

as of 01/31/20XX



Participation Rate

76%

Prudential Average: 84% as of 01/31/20XX



Average Contribution Rate

4%

Prudential Average: 6% as of 01/31/20XX



Sponsor Center Users

- John Consigli
- Karen B Spring
- Lisa McCarthy

To Do's

For me

- I need to go to the bank today
- Add Plan Representative

For Team

- Remove Sponsor Center User
- Upload Payroll File

Recent Activity

Transaction	Participant	Plans	Users	Activities
Transaction Type	Date	Value		
Contribution	02/21/20XX	\$ 2,345.99		
Hardship	02/12/20XX	\$ 1,789.24		
Termination	02/11/20XX	N/A		

Goals

as of 02/04/20XX

Reduce Cost

- Prospective or Retrospective Auto Enrollment
- eEnrollment material [Get Started](#)
- Defined Contribution Optimization

The following links open a new window:

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- Privacy Center
- Online Privacy Statement
- Transaction Execution Disclaimer
- Accessibility Help

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# Sponsor Center

> **Google Retirement Plan (123456)**

> **Subplans**

**Plan Balance**  
**\$1,856,457,089.02**

as of 05/12/2022

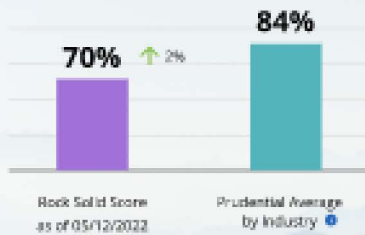
**Average Account Balance**  
**\$57,127.34**

as of 05/12/2022

**Average Loan Balance**  
**\$44,422.37**

as of 05/12/2022

## Plan Health 360



Your Rock Solid Score measures the overall health of your plan on a scale of 1 to 100, based on several key factors that lay the foundation of long-term financial security. [Find Out More](#)

### Key Insights

- ✓ Average Employee savings rates are 5.6%
- ✓ Automatic in-plan guaranteed income option exists
- ⚠ Contribution escalation maximum under 10%
- ⚠ Less than 65% of eligible employees are enrolled

Improve Your Plan's Health

## Notifications

- Payroll File Pending **12**
- Hardship Withdrawal **23**
- Participant Transactions **5**
- Financial Wellness Models **8**
- Item Five **11**
- Item Six **22**

> **Service Center Request** **23**

> **Reports** **5**

[More Details](#)

## Replacing Retirement Income

**80%**

as of 05/12/2022

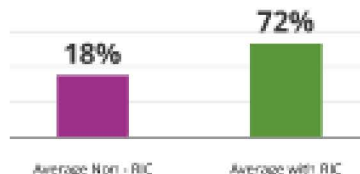


[More Details](#)

## Average Income Replacement

**45%**

as of 05/12/2022



[More Details](#)

## Participation Rate

**76%** **↑ 3%**

as of 05/12/2022



[More Details](#)

## Sponsor Center Users

Transaction **▼**

Transaction Type	Date	Value
Contribution	21/9/2022	\$2,345.56
Hardship	15/8/2022	\$1,789.24
Termination	9/7/2022	N/A

[More Details](#)

## To Do

For **John M. Smith**

- Go to the bank
- Add plan representative

For **Team**

- Remove Sponsor Center user
- Upload Payroll File

[More Details](#)

## Goals

**Reduce Cost**

- ✓ Prospective Auto Enrollment
- + Retrospective Auto Enrollment
- + eEnrollment Material
- ✓ Defined Contribution Optimization

[More Details](#)



Plan Balance  
\$1.86B

Avg. Account Balance  
\$57,089

Avg. Loan Balance  
\$44,023

# 74

## Rock Solid Score

As of Jan 31 2021

Industry Avg: 84

Your Rock Solid Score measures the overall health of your plan on a scale of 1 to 100 based on several key factors that lay the foundation for long-term financial security. [Learn more](#)

Next steps to improve your plan's health

Participation Rate  
+3.2%

### 85.2%

Industry Avg: 84.2%

Avg. Contribution Rate  
+0.3%

### 4.0%

Industry Avg: 5.8%

On Track to Replace Retirement  
-14%

### 69%

Industry Avg: 80%

## 1 of 5 Goals Achieved

### Reduce Cost (2/5 complete)

[Show completed tasks](#)

Prospective or retrospective auto-enrollment

[Get started](#)

E-enrollment material

[Get started](#)

Consolidate services with Prudential

[Get started](#)

### Manage Risk (4/5 complete)

[Show completed tasks](#)

Auto escalation

[Get started](#)

### Restructure Programs

[Show completed tasks](#)

Goal Achieved!

[See all goals](#)

## Recent Activity

Lorem ipsum dolor sit amet, consectetur [adipiscing elit](#)  
yesterday

Duis aute irure dolor in reprehenderit in [voluptate velit](#) esse cillum  
1w ago

Lorem ipsum dolor sit amet, consectetur [adipiscing elit](#)  
Feb 23, 2021

### Notifications

Payroll file pending 12

Hardship withdrawal 22

Participant transactions 2

Financial wellness models 8

Service center requests 12

Reports 5

[See all](#)

### To-do

Go to bank

Add plan representative

Remove sponsor center user

Upload payroll file

[+ Add Item](#)

### Recently Visited

[Document Repository](#)

[Investments](#)

[Sponsor Center Access](#)

