



Retirement Plan Communications Suite

Retirement Solutions | Plan Communications

A Comprehensive Communications Suite for Both Participants and Plan Sponsors

Today's rapidly changing marketplace for retirement savings plans demands a steady and reliable source for providing important plan information and disclosures to participants and plan sponsors. The Retirement Communications Suite from FIS™ offers a fully integrated solution with Relius Administration and MyRetirement to provide a secure, dynamic and cost-competitive solution for retirement communications.

Helping retirement plans of all sizes

Regardless of plan size, we can help clients get the most from participant and plan sponsor communications with configurable statements and enrollment kits. Our comprehensive offering includes monthly, quarterly, annual and on-demand participant and plan sponsor statements and enrollment kits which are available electronically or can be printed using our FIS fulfillment solution.

This communications suite provides:

- Participant and plan sponsor statements
- Enrollment kits
- Fee disclosures (404(a)-5)
- Fund fact sheets
- Web presentment of investment data



Solution Benefits

- Easy single-vendor implementation
- Fully integrated retirement projections
- Configurable and informative
- Complementary design to Relius Web
- Meets legal and regulatory requirements
- Ability to reduce costs, increase data security and streamline business operations
- Communications are produced, printed and archived by FIS

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Configurable design that is representative of the online experience

Account Summary

Beginning Balance (as of 4/30/2016)	\$21,187.89
Additions	\$564.23
Withdrawals	-\$113.06
Gain/Loss	\$876.43
Ending Balance (as of 5/31/2016)	\$23,987.65
Vested Balance (as of 5/31/2016)	\$23,987.65

Investment Allocation Summary

U.S. Stocks	25%
International	20%
Balanced	25%
Other	30%

Full color options

Integrated retirement income analysis

Contribution activity by source

Projected Retirement Income

Goal: \$5,000/mo. Projected income/mo: \$2,821. 51% of the way there!

Contribution Activity by Source - Option 1

	This Period	Year-to-Date
Deferral	333.33	333.33
Match	222.22	222.22
Profit Sharing	0.00	0.00
Total Contribution Activity	\$555.55	\$555.55

Model Portfolios - Short Term

Fund Name	Ticker	Allocation	3 Mo	1 Yr	3 Yr	5 Yr	10 Yr	Since Inception	Expense Ratio	
ALLIANZ OCC RENISSANCE C	PONCK	2.01%	0.51%	9.00%	12.69%	-2.61%	-2.61%	9.74%	12/26/16	9.74%
ALLIANZ OCC RENISSANCE C	BMCKX	5.03%	0.42%	6.60%	8.63%	1.61%	1.61%	5.72%	12/26/16	9.74%

Model Portfolios - Conservative Plan

Fund Name	Ticker	Allocation	3 Mo	1 Yr	3 Yr	5 Yr	10 Yr	Since Inception	Expense Ratio	
ALLIANZ OCC RENISSANCE C	PONCK	2.01%	0.51%	9.00%	12.69%	-2.61%	-2.61%	9.74%	12/26/16	4.76%
ALLIANZ OCC RENISSANCE C	BMCKX	5.03%	0.42%	6.60%	8.63%	1.61%	1.61%	5.72%	12/26/16	4.76%

Investment model friendly

Dynamic layout

About FIS Wealth and Retirement

FIS provides wealth management and retirement technology and services that help banks, trust companies, brokerage firms, retirement plan administrators and advisors accelerate asset growth and optimize operations to achieve better outcomes for the end investor. We provide solutions for client acquisition and communication, transaction management, risk and compliance, portfolio accounting, plan administration and reporting that can be deployed as stand-alone products, part of a unified platform, or outsourced services.

Enabling the Adaptive Enterprise

Sitting at the intersection of technology and finance, FIS is focused on delivering fresh ideas and inventive solutions to help our customers adapt and thrive in an ever changing environment. With a blend of software solutions, cloud infrastructure, global service capabilities and deep domain expertise, FIS is capable of supporting virtually every type of financial organization, including the largest and most complex institutions in the world. For more information, please visit www.fisglobal.com.