

# PlanVisualizer<sup>TM</sup>

## See retirement plan design in a whole new light

This powerful tool offers an unprecedented view of retirement plan data and real-time interactivity to model features and costs, making it easier to optimize plan design. Here's how it works:

### Customizable PDF reports available

#### These reports show

- Comparisons of participant retirement readiness rates by various age and salary ranges
- Breakdowns of participation rates, deferral rates, and employer match
- Participants' progress toward goals by age and salary, and at group and individual levels
- Estimated costs of suggested plan design changes



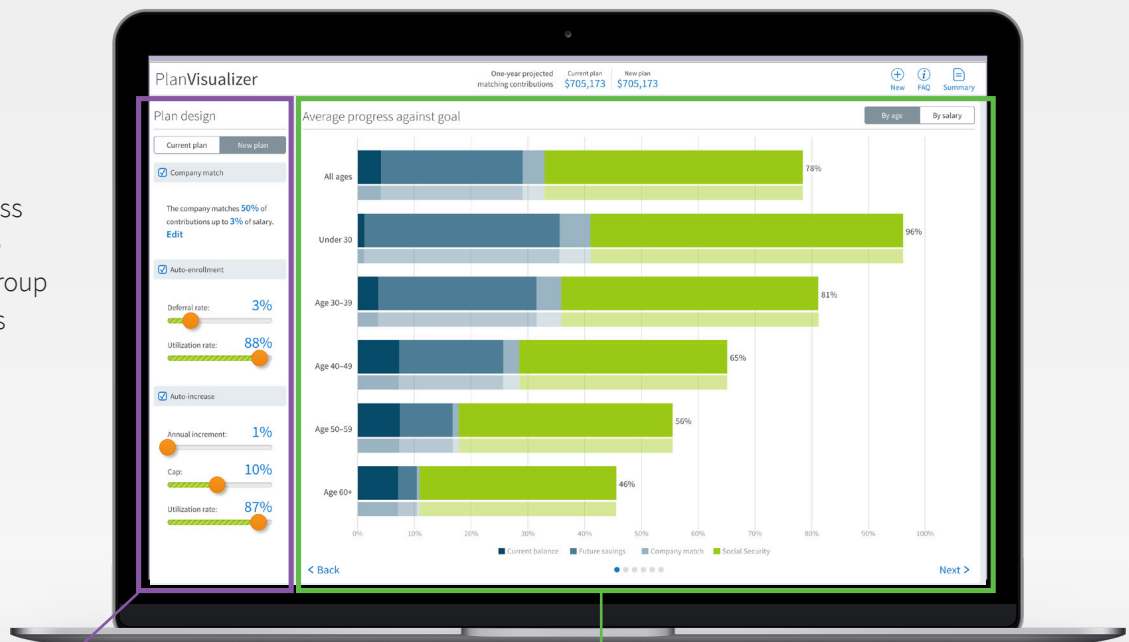
**Upload anonymous participant data** for age, account balance, salary, and deferral rate. You can also demo the tool using default data.

Loading a plan's participant data is easy [Download a template Excel file](#)

You can upload an Excel spreadsheet that just contains four data elements for each:

	Age	Current Balance	Salary	Deferral rate
	A	B	C	D
1	Age	Balance	Salary	Deferral
2	40	\$235,652	\$131,696	14%
3	24	50	\$59,160	0%
4	29	\$126,697	\$84,783	25%

[Upload](#) or drag and drop a file here.



**Enter current plan defaults** for company match, auto-enrollment, and auto increase. You can change these on each page as you view results.



**View current participant readiness** by age and salary for balance, future savings, company match, and expected Social Security income.

# PlanVisualizer makes it easy to see if plan participants — at all ages and salary levels — will be ready to retire.

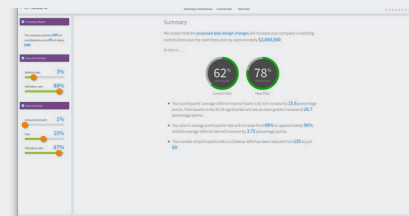


Visualize potential plan changes, such as average participation rates, average deferral rates, company match, and their likely impact on metrics and costs.

Average participation rate	<b>95.3%</b>	<b>67.4%</b>
Average deferral rate	<b>9.5%</b>	<b>5.8%</b>
Employer match	50% up to 3% <b>\$531,482</b>	50% up to 3% <b>\$531,482</b>
Auto-enrollment	At 3% (88% utilized) <b>\$152,484</b>	Not offered <b>\$0</b>
Auto-increase	1% to a max of 10% (87% utilized) <b>\$6,606</b>	Not offered <b>\$0</b>
<b>Total</b>	<b>\$690,572</b>	<b>\$531,482</b>



Compare scores for the current plan versus a potential new design across the participant population, and view costs and summary details.



## Take advantage of this powerful tool to optimize retirement plans.

To request access, please contact your DC Investment Specialist or call 1-866-4PUTNAM (1-866-478-8626).

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