
DELUXE BOOKLET

In general, this is a completely customized service that is designed based on your needs. Cost is based on Proposal parameters.

Benefit Statement Cover is completely customized to your needs.

Eight (or more based on proposal) pages all of which may contain variable information.

Type fonts and size are customizable. Inside structure of the Benefit Statement is completely customizable.

Benefit Plans may be complex and multiple. Cost will be dependent on complexity.

We analyze benefit information provided by you at our first meeting and develop benefit statement text and logic based on this information.

Multiple data files permitted. Cost will be included in the proposal.

2 meetings at client office.

Statements can be individually mailed or bulk shipped to your office in envelopes. Envelopes are printed by FinStat.

We send you up to 35 sample employee reports that you use to check accuracy of benefit statement before mailing.

Overnight mailing of listings or other items are permitted. E-Mail is available for all transactions.

STANDARD BOOK

This is a *partially* customized service. There are limitations on complexity, detail, and amount of information reported on the benefit statement.

Benefit Statement Cover is burgundy with two die cuts through which your laser printed company logo and the employees name shows. This cover can **not** be altered.

Eight pages, five of which may contain variable information. Additional pages are not available for this product.

Type fonts and size are unalterable. Overall structure of the inside of the statement is fixed and unalterable. Welfare plan wording is customized to your plans. Significant change to our 401(k) wording may incur additional fees.

One set of Benefit Plans. Multiple benefit plans are billed at \$350 additional fee per plan variation.

You complete a questionnaire from which we develop benefit statement text and logic.

Multiple data files allowed. Cost is \$250 for each file in excess of one. Multi-Record data files permitted at additional fee.

\$1,200 additional per meeting.

Statements are bulk shipped to your office in envelopes. Envelopes are printed in black by FinStat.

We send you up to 10 sample employee reports that you use to check accuracy of benefit statement before mailing.

No overnight mailings of listings or other items are permitted. Two day priority U.S. mail is used for all mailings. E-Mail is available for all transactions.

SIMPLIFIED ONE PAGE

This product has limitations on space available and detail shown.

No cover provided for this statement.

One sheet statement. Information is placed on specific areas of the benefit statement.

Type fonts and size are unalterable.

Benefit Plans may be complex and multiple since all information is entered by the client.

All benefit statement information is provided on one spreadsheet the you complete.

One data file in predesignated spreadsheet format. Other formats may be permitted, but will significantly increase cost.

\$1,200 additional per meeting.

Statements are bulk shipped to your office without envelopes.

We send you up to 5 sample employee reports that you use to check accuracy of benefit statement before mailing.

All items sent first class mail. E-Mail is used for all transactions.