

- Please provide the current plan documents (latest restated version), any amendments, and service agreements. **Attached**
- How many unique individuals are there across both plans? **401– 404 participants 457- 121 participants**
- Do you currently have Roth IRAs through your current provider? **Yes**
- If so, provide number of participants and total assets. **19 participants – balance \$101,043.65**
- What are your education program preferences? **Individual and group**
- How many dedicated days (includes group and individual 1:1) **Quarterly on-site group meetings 1:1 as requested**
- Do you prefer onsite, virtual, or both based on individual preferences? **Both**
- For on-site, how many locations are there? **3 main locations**
- Do your employees participate in social security?
- Do you currently work with a payroll vendor or utilize a software in house? **Sage**
- What is your payroll frequency? **26 payrolls per year**
- If multiple payroll frequencies depending on roles and department, please describe. **N/A**