

PlanVisualizerTM

See retirement plan design in a whole new light

This powerful new 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:

NEW FEATURE: Customizable PDF reports

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



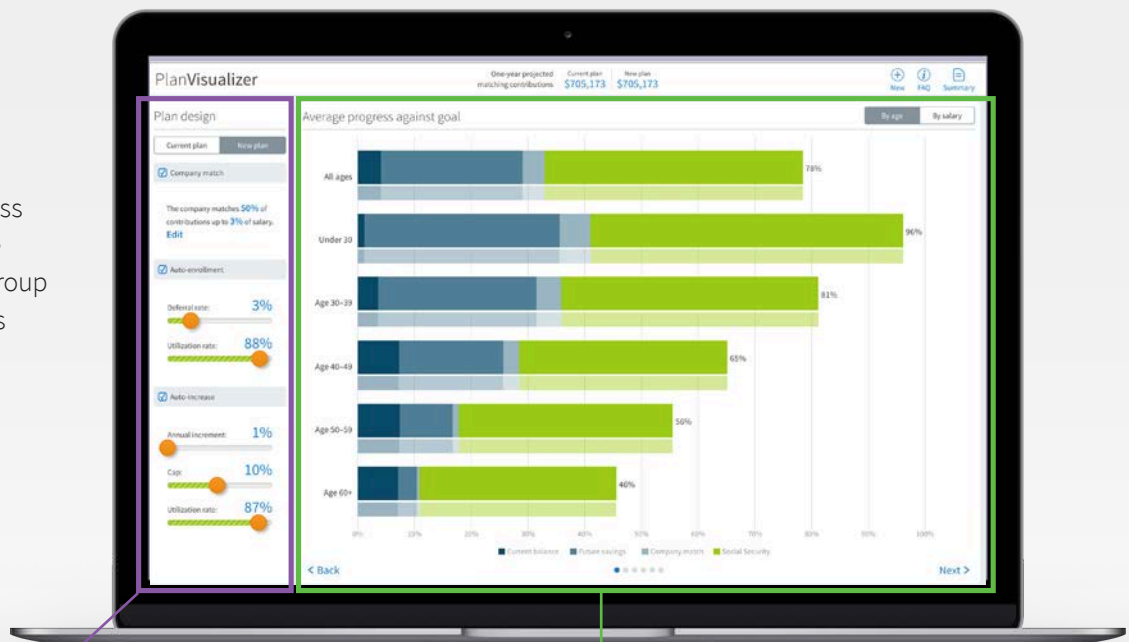
Upload anonymous participant data for age, account balance, salary, and deferral rate. You can also demo the tool using default data.

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	\$131,096	14%
3	24	50	\$59,160	0%
4	29	\$125,837	\$84,783	21%

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

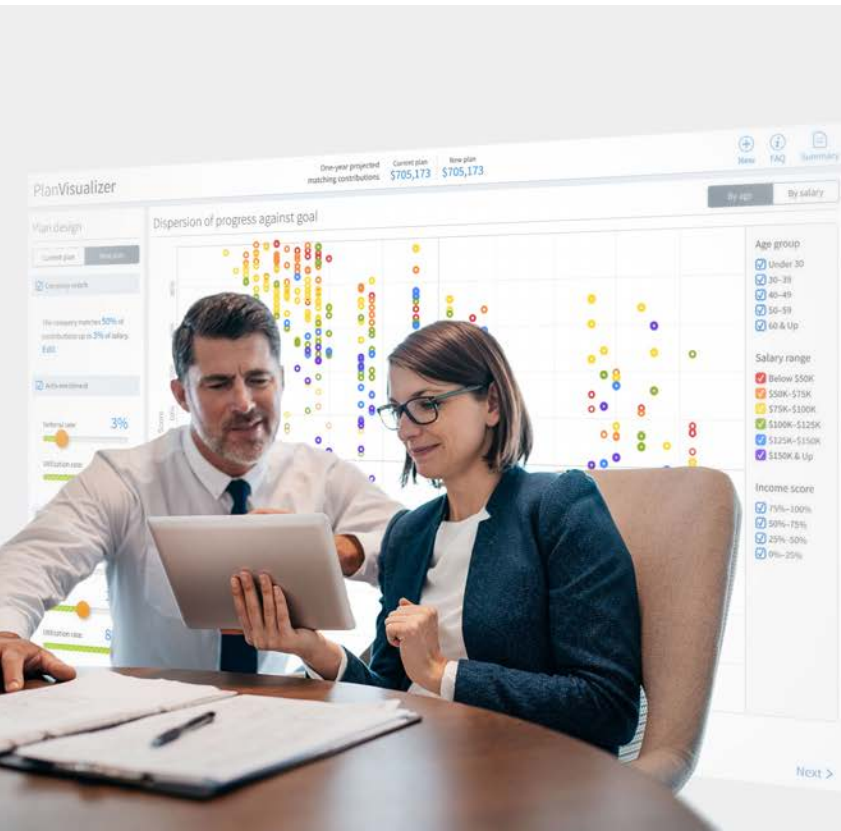



Enter current plan defaults for company match, auto-enrollment, and auto increase. You can change these on each page as you view results.




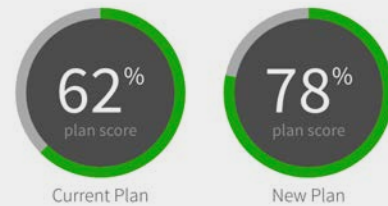
View current participant readiness by age and salary for balance, future savings, company match, and expected Social Security income.

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.

 **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 new 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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Putnam Retail Management

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