


# PlanVisualizer<sup>TM</sup>

## 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:


 **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 participant.

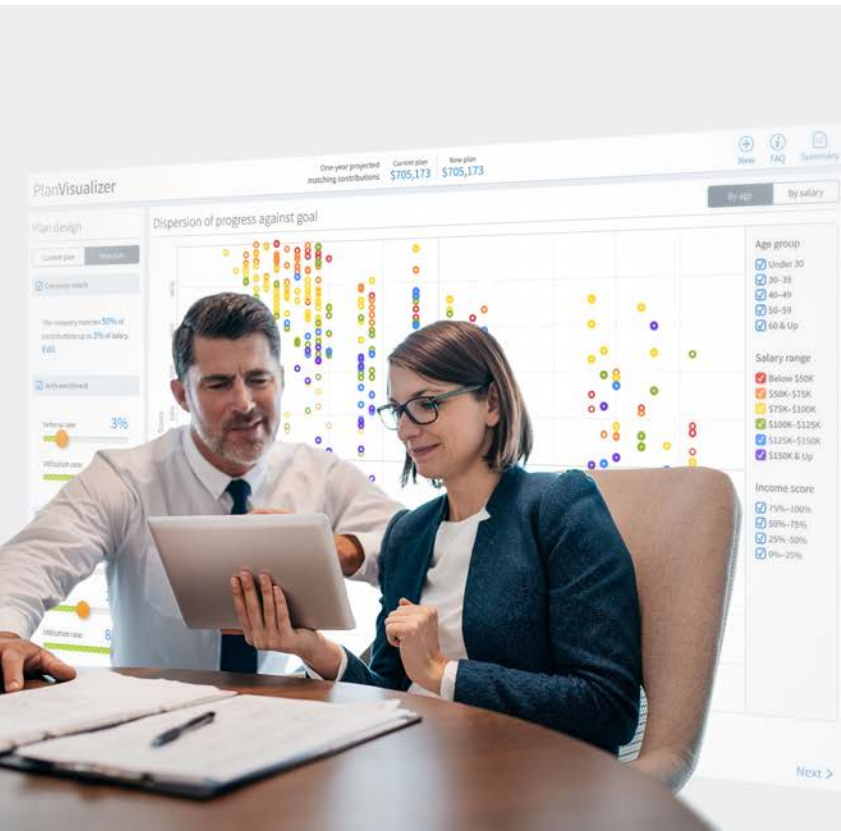
	Age	Current Balance	Salary	Deferral rate
	A	B	C	D
1	Age	Balance	Salary	Deferral
2	40	\$235,652	\$131,696	14%
3	24	\$0	\$59,160	0%





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

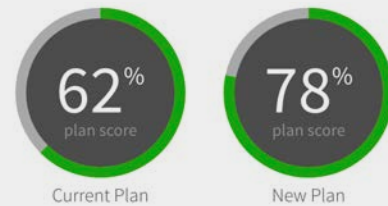
 **View current participant readiness** by age and salary for balance, future savings, company match, and expected Social Security income.

# 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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