

## BCSE/CEBN Association Plan

### *An Exclusive Membership Benefit*

#### Record Keeping: Empower Select

- World class record keeper
- State of the art and user friendly technology interface
- Mobile device connection
- Access to participant education tools and resources

#### Investment Lineup

- The lineup is pre-built by LeafHouse
- Includes ESG (environmental, social and governance) investments
- Includes an ESG target date funds managed by Natixis
- Diverse investment options including active and passive investments to give participants choice

#### Third Party Administrator: Pentegra

- Provides 3(16) fiduciary services
- Compliance testing and 5500 preparation
- Plan document support
- Day to day administration services

#### 3(38) Investment Fiduciary: LeafHouse Financial

- Investment selection and monitoring done by LeafHouse
- LeafHouse shares fiduciary duty regarding investments with the plan sponsor

#### 401(k) Advisory Services

- TriBridge Partners selected to serve as the preferred advisory partner (advisory flexibility available upon request)
- Advisory services include, fee benchmarking, plan design consulting, participant education and transition assistance

#### As a Whole, the BCSE/CEBN Association Plan Offers (Exclusive to Members):

- A turnkey solution to help make it easier for companies to offer competitive benefits to help companies attract and retain talent
- Holistic fiduciary protection
- Competitive investment lineup with ESG strategy options and Target Date Funds
- Flexibility to work with your existing Plan Advisor
- Ease of administration
- User friendly interface