Fiduciary Briefcase

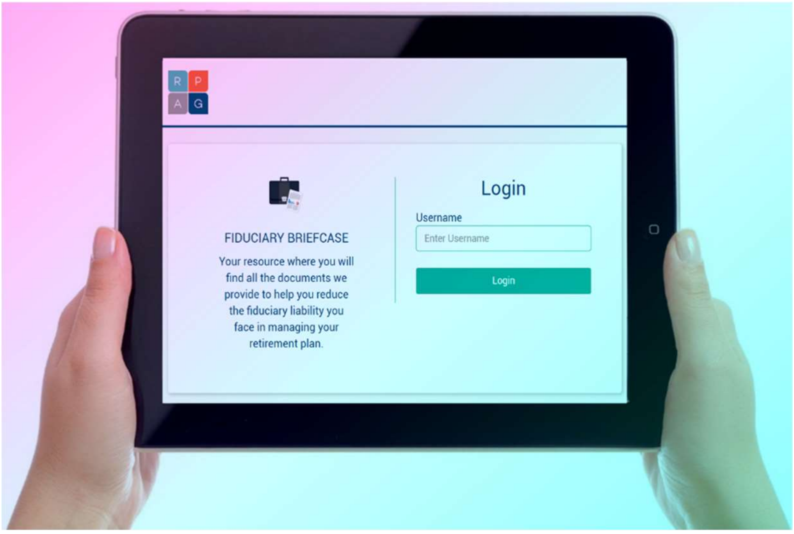
The Fiduciary Briefcase is a proprietary online portal designed to be your private filing system in the virtual world. Housing meeting summaries, compliance documents, newsletters and so much more, the Fiduciary Briefcase gives your committee anytime access to pertinent plan information and readily prepares your plan for audit.

Online Protection for Added Peace of Mind

We recognize that proper documentation is an important step in the fiduciary process. At the onset of each client relationship, we create a username and password for you to access your own Fiduciary Briefcase through the [FIRM NAME] website. Serving as your personalized depository for plan documents and reports, we post all deliverables to the site for secure, anytime-access.

Site Resources

- Customized Service Plan
- Meeting Minutes
- Committee Charter
- Disclosure Documents
- Investment Policy Statement
- Plan Documents
- Monthly Retirement Times Newsletters
- Quarterly Market Summaries
- Sample Employee Memos
- Participant Education Materials
- Assigned Plan Consultant Contact information
- Archived [FIRM NAME] Deliverables
    - Fiduciary Investment Reviews
    - Fiduciary Plan Reviews
    - Provider Analysis & Benchmarking Reports



For more information, contact your financial professional at [EMAIL] or call [PHONE NUMBER].

[ADDRESS] | [PHONE NUMBER] | [WEBSITE]

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