

UPDATE

Employee Benefit News for
The Cooperative Industry



MARCH 2020

Learn More about Your Plan's Data

In 2019, Milliman updated and enhanced the plan-level reporting that Plan Sponsors can access through **MillimanBenefits.com**.

Now, Plan Sponsors can quickly and easily review tiles with different plan details. Find the tiles you need using the following tabs on your Dashboard:

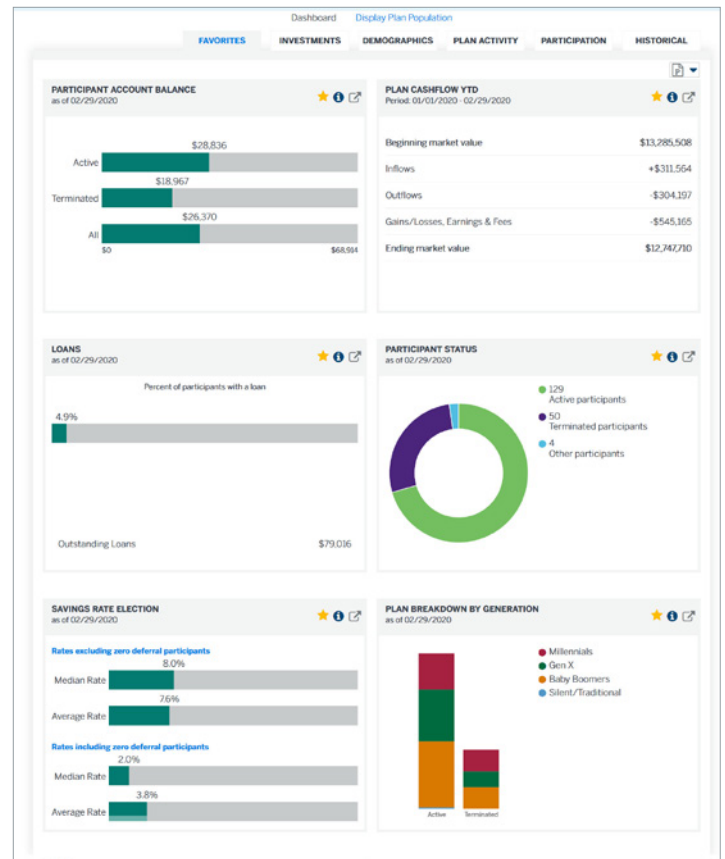
Favorites: If there is a specific data point that you are interested in or regularly check, you can add that tile to your Favorites by clicking on the star next to its title. Going forward, whenever you log in as a Plan Sponsor, your favorite tiles will be the first thing you see.

Investments: Learn more about account balances, default investment utilization, asset class and investment allocations and participant performance by period.

Demographics: View the plan breakdown by age, generation, tenure and salary. You also have the ability to review information about terminated participants.

Plan Activity: You can quickly review information such as loan utilization, YTD distributions, YTD cashflow, YTD plan contributions and plan source allocations.

Participation: Review plan participation, savings rate elections and Auto Increase utilization.

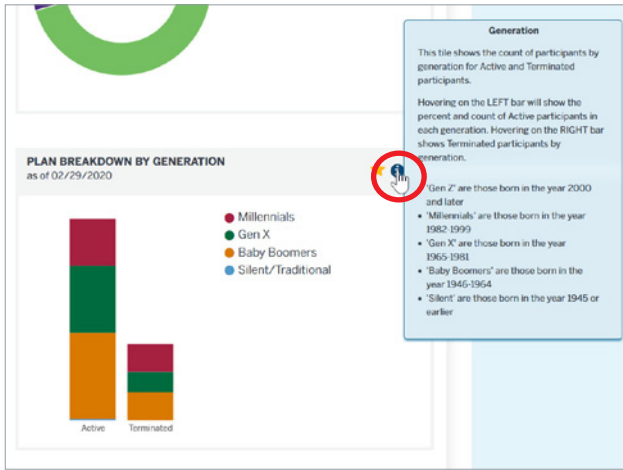


coop401kplan.com
800.652.6675

Co-op **401k** Plan 

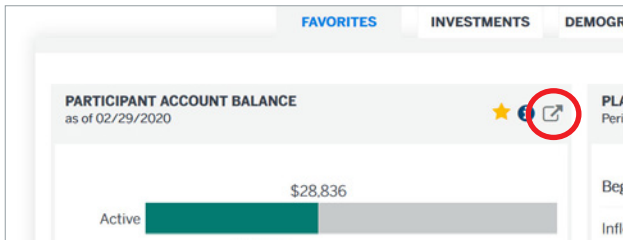
AMERICA'S LEADING 401(k) PROGRAM FOR COOPERATIVES

Unsure what the data is trying to tell you? To learn more about the tile's data point, simply hover over the blue information icon to see more information about any given tile.

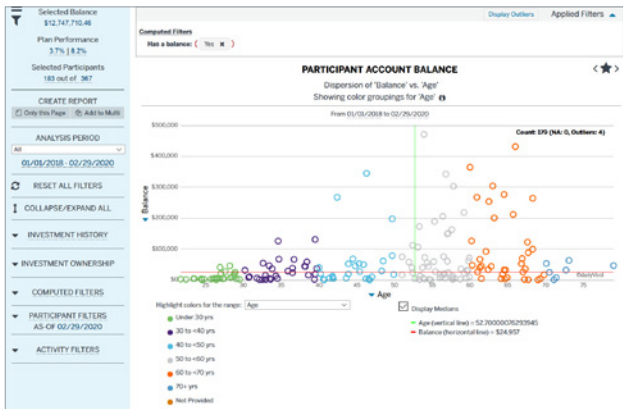


Expand the Data

If you're interested in a more in-depth view of a particular data point, click on the arrow icon next to the tile's title.



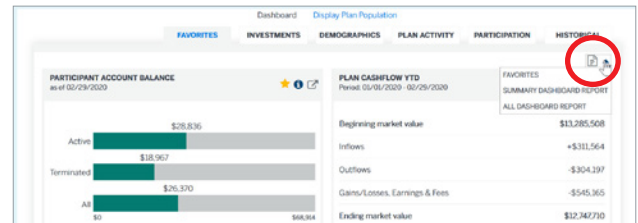
From there, you'll be able to see an expanded view of the data field with additional filters that allow you to drill down into your plan data. You may sort or filter the data based on many different factors such as salary, age or generation.



Take the Information With You

If you'd like, you have the ability to download the tables and graphs from the tiles. You can choose to download your Favorites, a Summary Dashboard Report or an All Dashboard Report.

To do so, click on the icon located in the top right of each page of the Dashboard and select the option you'd like to download as a PowerPoint presentation.



The PowerPoint presentation provides an easy way for you to assess the health of your Milliman-administered plan(s) and identify opportunities for improved plan design or additional communications.

Questions?

If you have any questions regarding MillimanBenefits.com or the Dashboard, contact your Relationship Manager or call 800.652.6675 option 2.

Market Volatility

The market can sometimes feel like a roller coaster, especially in light of recent coronavirus concerns.

Market volatility (when the market rises and falls rapidly) may be unsettling, but it is important for participants to remain as emotionless as possible when making important financial decisions. To learn more, visit www.healthyfinancialoutcomes.com/market-volatility.

Milliman is not a law firm. Nothing in this correspondence should be construed as legal advice. Past performance is not a guarantee of future results. Data is for illustration purposes only.