COPILOT FOR PLAN SPONSORS

A streamlined 401(k) retirement solution designed for small businesses

CoPilot is a simple, cost-effective 401(k) retirement plan that eases the administrative burden of offering a 401(k) plan to your employees. Through a clear, skillfully selected 401(k) plan design, CoPilot allows you to free up your time to focus on running your business.

- Straightforward, transparent pricing
- Low cost investment menus
- Automatic enrollment and increases
- Plan Health Report with customizable metrics

DESIGNED WITH YOU IN MIND

CoPilot saves you time, reduces investment fiduciary responsibility, and helps:

- Your business—Attract talent, retain employees, and maximize tax benefits. Read more about [more potential tax benefits] that may be available to you through SECURE 2.0.
- Your participants—Auto-enroll gets employees started on the path to retirement readiness and increases plan participation rates.
- You as the plan sponsor—CoPilot monitors plan activity and provides you with a Plan Health Report and proactive messaging.

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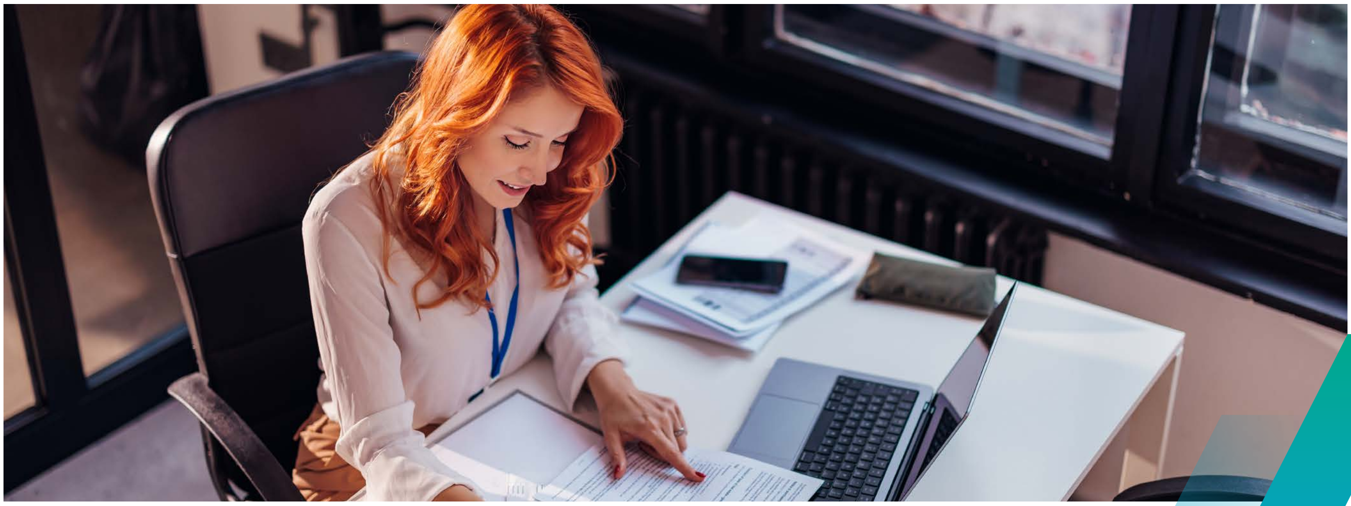
Save time and improve outcomes—CoPilot's online setup, enrollment, and payroll integration can save you time on administration and increase data accuracy.

Manage your risk—With research-based plan tools and education backed by a team of support specialists, the CoPilot 401(k) is designed to make saving for retirement simpler and easier for you and your employees. CoPilot 401(k) plans offer investment fiduciary coverage[1] and services including professionally managed investment portfolios from Newport Group Consulting, a national 3(38) investment manager.

Enhance your employees' financial wellness—CoPilot offers Financial Wellness, a holistic program created by Financial Finesse, that provides employees with free access to unbiased, personalized resources and guidance—including virtual financial coaching—to help them pursue financial well-being.



A STREAMLINED, COST-EFFECTIVE SOLUTION

Investments Available	Professionally managed portfolios* Individual investments *Five investment allocation models (Income, Conservative, Moderate, Growth, and Aggressive)
Pricing	**Employer** Implementation fee (one time)........$500 Base fee........$125/month
	Employee Recordkeeping fee........$4 per participant/month Annual custodial and trading fee[2]........0.07% Annual investment fiduciary fee[2]........0.25%

Pricing is subject to change. Excludes investment expenses.

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A PARTNER YOU CAN TRUST

Ascensus is the largest independent recordkeeping services provider, third-party administrator, and government savings facilitator in the United States.[3]

153,700+ retirement plans administered[4]

4.7+ M retirement plan participants[4]

$818+ B in assets under administration[4]

28x "Best in Class" Award Winner
Most awards won among all retirement plan providers for plans up to $50 million[5]

PLANADVISER Adviser Choice Award
Winner in the recordkeeping category[6]

Retirement Leader of the Year[7]

[1]Investment fiduciary services are offered through Newport Group Consulting, LLC, an SEC registered investment adviser.
[2]Fees are shown in annual terms but are deducted monthly.
[3]Cerulli Associates. The Cerulli Report: U.S. Retirement Markets 2023. December 2023.
[4]As of June 30, 2024.
[5]PLANSPONSOR. 2023 Defined Contribution (DC) Survey. February 2024.
[6]PLANADVISER. 2023 Retirement Plan Adviser Survey. March 2024.
[7]With Intelligence. With Intelligence Mutual Fund & ETF Awards. June 2024.

Ascensus' award-winning service, technology, expertise, and the simple plan design of a CoPilot 401(k) makes offering your employees a retirement solution an easy decision.

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Investment Advisory and fiduciary consulting services are offered through Newport Group Consulting, LLC, an SEC registered investment adviser and subsidiary of Newport Group, Inc, an Ascensus company. For more information about Newport Group Consulting and its services, please visit newportgroup.com or refer to our Form ADV Part 2, which is available by contacting us at 407-333-2905, visiting our website, www.newportgroup.com or adviserinfo.sec.gov.

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