

FIDUCIARY SUPPORT:

TAG Resources 3(16) plan administrator fiduciary

- Signs and files Form 5500
- Reviews, signs participant distributions
- Distributes all required notices to participants
- Scrubs each payroll file for completeness and accuracy

TAG Resources 402(a) named fiduciary

- Controls and manages the plan's operation and administration
- Signs John Hancock Recordkeeping Agreement on plan's behalf

ADMINISTRATIVE SUPPORT:

Dedicated plan implementation specialist

- TAG drafts plan document - full range of plan design options
- Flexible payroll remittance (no proprietary payroll vendor)
- Coordinates enrollment materials and meetings with John Hancock and your financial advisor

TAG Resources TPA

- Dedicated account manager for day to day support and research
- Conducts required nondiscrimination testing and prepares filings
- Remits contributions to John Hancock for investment

PARTICIPANT SUPPORT:

John Hancock provides

- Ongoing participant enrollment and education materials/workshops
- Concierge support for transferring rollovers
- Full-service website, mobile app and contact center
- Comprehensive investment menu