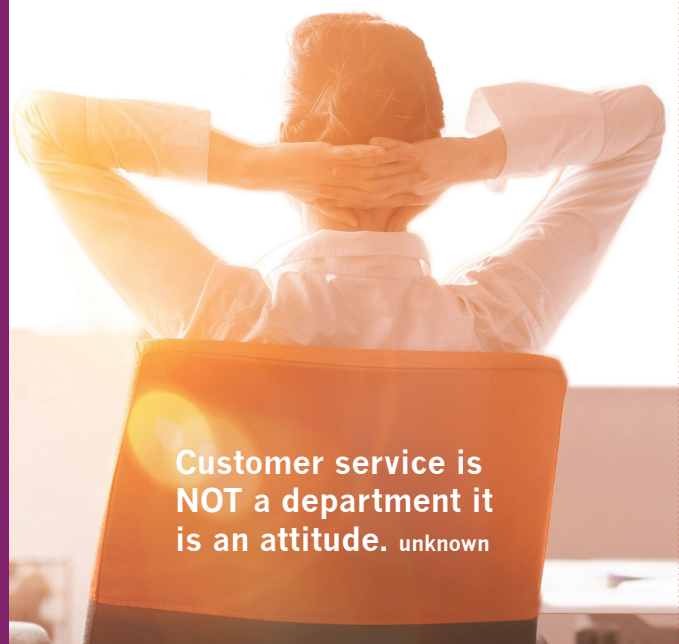




Swerdlin's website can be customized to fit your needs. Our #1 Customer Service goal is to accommodate all of the needs of our clients in timely and efficient ways.

Our core ESOP Administration services include total web access and Participant Call Center at **no additional costs.**

To schedule a full web demo, please call 1-800-507-9373 to speak with a service rep.



Customer service is **NOT** a department it is an attitude. unknown



To schedule a full web demo, please call 1.800.507.9373



5901 Peachtree Dunwoody Road,
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Phone: 770.396.6601
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swerdlin.com

Navigating Your Online Tools:

MyESOPaccount.com


for Plan Sponsors & Plan Participants




Actuaries and Employee Benefits Consultants



PLAN SPONSOR ACCESS

DASHBOARD 
Plan Summary

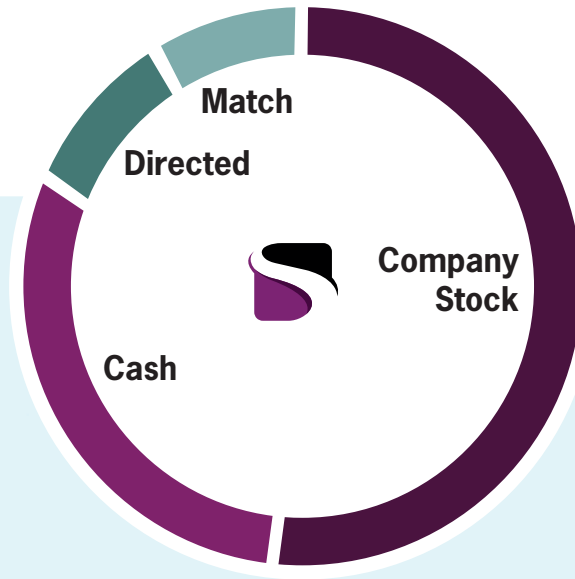
MANAGE ACCOUNTS
Participant Inquiries
Approve Distributions
Census Data Updates

GOVERNANCE & REPORTS
Record Important Decisions
Store Important Documents
24/7 Reports & Analyses
Provide Online Forms 

**EASY & EFFICIENT COMMUNICATION
& EDUCATION CAMPAIGNS**
Streamlined Compliance Procedures
Communication Campaigns
Targeted Education Programs



ESOP ACCOUNT



- Company Stock 51%
- Cash 30%
- Directed 10%
- Match 9%



PLAN PARTICIPANT ACCESS


DASHBOARD
Account Summary

MY ACCOUNT
Beneficiary Designations
Online Applications for Benefits
Personal Data Updates

STATEMENTS & TOOLS 
24/7 Participant Statements
Plan Policies, Forms, & FAQs
Retirement Planning Tools

COMMUNICATION & EDUCATION
Disclosures & Notifications
Customized Announcements & Alerts
ESOP Education / Team Building



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