

Plan Reports for Employers

Our Goal is Simple:

We want to create the opportunity for everyone to pursue financial well-being. And we believe that having access to plan information is essential to helping you and your employees pursue that financial well-being.

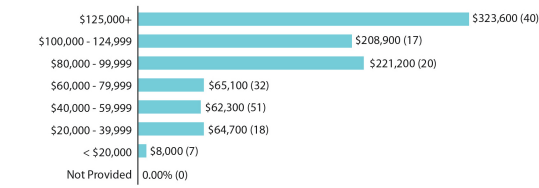
Employers can access their plan’s quarterly health report as soon as it is posted to their plan’s [website](#).

Benefits and solutions of the Security Benefit plan health report:

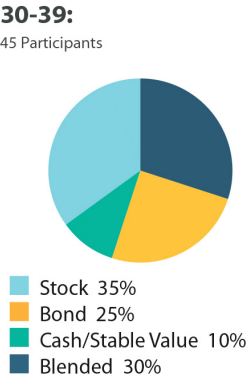
	Comparison Period as of 12/31/2017	Your Plan as of 9/30/2018	Benchmark*
Total Plan Assets	\$27,452,500	\$27,673,200	—
Active Participants	145	150	—
Average Account Balance	\$140,000	\$114,600	\$131,355
Investments Offered	25	23	20
Investments with a Balance	18	18	—
Average Number of Investment Options Held	3.7	3.3	—

* Benchmark values presented are based on the Plan Sponsor Council of America’s (PSCA)

60th Annual Survey of Profit Sharing and 401(k) Plans, representing 2016.



- Data-driven insights to help identify changes that may improve your plan participation and plan design
- A benchmark visual to help you rank your plan features against similar plans
- A quarterly asset and participation comparison to help illustrate growth or decline in participation
- Demographics to show participation, average account balance, and average contribution by age, compensation, tenure, and gender
- Loan information which will detail the number and balance of outstanding loans by participant age groups
- Investment allocations by participant age group, as well as high level transaction activity by investment



We encourage you to take advantage of this tool on a quarterly basis — to review your plan’s health and to determine if an updated strategy might be necessary to improve its participation or design.

- [Plan Health Report Example](#)
- [Plan Health Report Access Instructions](#)

If you have questions or require additional online access for another plan representative, please contact our Service Center at 800.747.3942.

Related Products

- [SFR Program](#)
- [SecurePoint Retirement Program](#)
- [Workplace Retirement Program for ERISA Plans](#)
- [Workplace Retirement Program for Non-ERISA Plans](#)

Services offered through **Security Distributors**, a subsidiary of Security Benefit Corporation (Security Benefit).

Neither Security Benefit Corporation nor its affiliates are fiduciaries. This information is general in nature and intended for use with the general public. For additional information, including any specific advice or recommendations, please visit with your financial professional.