

Sponsor Web Site

Wireframes

SponsorWeb WIREFRAMES_24.vsd
02/28/2012

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Sharepoint Location:

PR5772 - Sponsor Website Redesign > User Interface Design > wireframes >

SponsorWeb WIREFRAMES_24.vsd

Orange text indicates recently updated wireframe.

1	Cover		
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3	CQ 6407 - Relationship Summary	19	CQ6406 - Plan & PPT
4	user entry process flow	20	Plan Summary-BAL ONLY
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		47	Post Login Help Landing

2011.07.21

- James creates dashboard wire based on Kate's earlier mockups.

2011.08.21

- added sitemap / Process Flow page
- secondary navigation screen

2011.09.05

- Revisions to enhance the "Select a Plan" screen
- Additions to the Plan Dashboard including PlanFirst.

2011.09.08

- Begin IT annotations

2012.02.22

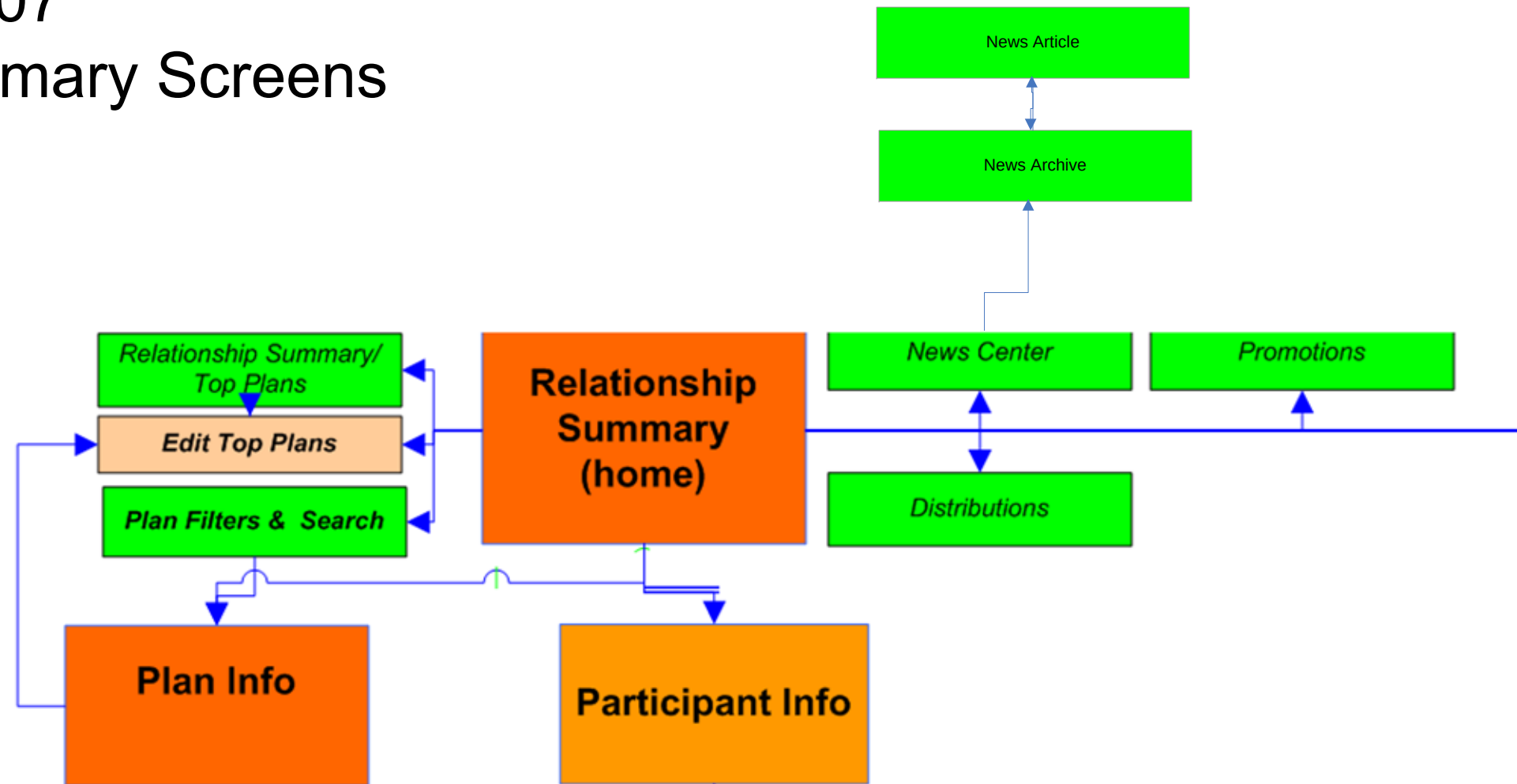
- Updated user entry process flow

2012.02.28

- Further minor RS updates
- New Activity History and Summary screens for PPT and Plans

CQ6407

Relationship Summary Screens



User logs in to Web site

User has > 1 plan assignment?

Yes more than one Plan

User has <10 TOTAL Plan assignments?

Yes

Has user already assigned his top plans?

Yes

System Displays Top Plan Selections on RS screen.

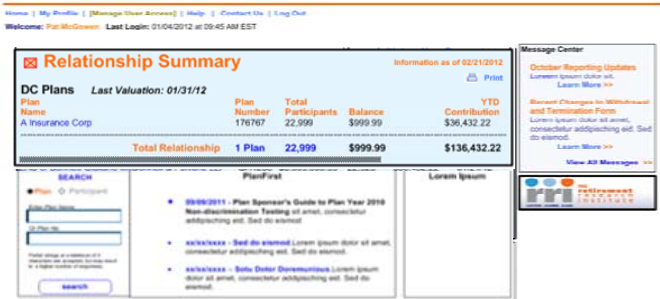
No

System displays UP TO THE first 10 Plans (alphabetical)

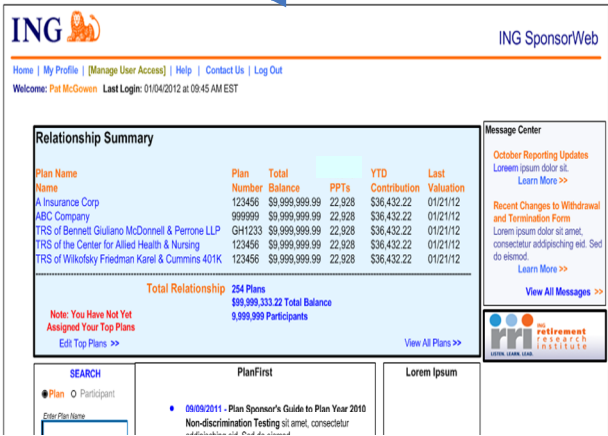
Along with instructions for assigning Top Plans

No – Only one Plan

NO



Screen will show all links.
There will be no “Favorite Plans” variation to the summary pagelet.
“Edit Top Plans >>” Link will be suppressed.



Initial screen (before the user selects his top plans) will always show [only] the first 10 alphabetical plans in the users access.



Once the user selects his Favorite Plans, these Favorite Plan entries (along with the aggregation numbers) is what appears on his RS screen.

User can select 1 to 10 Plans to display as “Favorite Plans”

Favorite Plans are the COMBINED total of all DB, DC Plans and Divs Subs rows.

If the user has less than six plans, the screen will suppress the Top Plans title and “Edit Top Plans” link.



[Company Code Name]

 **Print**

POTENTIAL BANNER

DC Plans *Last Valuation: 01/31/12*

Total Relationship	1 Plan	22,999	\$999.99	\$136,432.22
--------------------	--------	--------	----------	--------------

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Welcome: Pat McGowen Last Login: 01/04/2012 at 09:45 AM EST

ING SponsorWeb

[Company Code Name]

Print

POTENTIAL BANNER

POTENTIAL BANNER

Relationship Summary

Last Valuation: 01/31/12

Divisions/
Locations

Div /Sub Location 1

ABC Company

TRS of Bennett Giuliano McDonnell & Perrone LLP

TRS of the Center for Allied Health & Nursing

TRS of Wilkofsky Friedman Karel & Cummins 401K

YaY Company

YBB Company

ZRS of Bennett Giuliano McDonnell & Perrone LLP

ZRS of the Center for Allied Health & Nursing

ZRS of Wilkofsky Friedman Karel & Cummins 401K

Plan
Number

176767

999999

GH1233

2314212

1234756

123456

993339

GH1243

144444

123456

Number of
Participants

22,999

40

3,333,909

433

4,392

45,202

434

233,339

1,292

3

Total
Balance

\$999.99

\$99.99

\$9.99

\$0.99

\$9,889,999.99

\$9,555,999.52

\$9,444,999.78

\$9,554,999.99

\$9,444,444.45

\$9,111,999.02

YTD
Contribution

\$36,432.22

\$4,36,432.22

\$36,432.22

\$36,432.22

\$36,432.22

\$10,36,432.22

\$432.22

\$32.22

\$2.25

\$.94

Total Relationship

16 Division/Locations

9,999,999

\$99,999,333.22

\$19,237,343.95

Select Top Plans >> | View All Participants >> | View All Plans >>

SEARCH

Plan

Participant

Last Name:

First Name:

Employee ID No.

Last 4 digits of SSN:

Partial strings at a minimum of 4 characters are accepted, but may result in a higher number of responses.

search

PlanFirst Online

02/21/2012 - Plan Sponsor's Guide to Plan Year 2012 Non-discrimination Testing

Sit amet, do eismod.

xx/xx/xxxx - Sed do eismod.Lorem ipsum dolor sit amet, consectetur addipiscing eid. Sed do eismod.

xx/xx/xxxx - Sotu Dolor Doremunious.Lorem ipsum dolor sit amet, consectetur addipiscing

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Information as of 02/21/2012

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Notes/Annotations

Plan Number	Location Name	Assets as of 01-31-2012	Contributions for January, 2012
	Total Sponsor Relationship	\$50,120,576.09	--
878125	8888 immediate deposit divsub 8888	--	--
878125	ASSETWORKS 1008	\$3,984,305.39	--
878125	CENTAMAN 1017	--	--
878125	COMMON CENTS 1013	\$196,027.00	--
878125	COMPUSOURCE 1012 1012	--	--
878125	CONSTELLATION SOFTWARE, INC. RET 0001	--	--
878125	CONSTELLATION SOFTWARE-MAJIQ 1015	\$1,237,483.93	--
878125	COURTVIEW 1009	\$2,674,179.31	--
878125	Clubsystems Group, Inc 1004	--	--
878125	Computation 1006	\$3,553,778.85	--
878125	Constellation Homebuilder System, Inc 1002 1002	\$3,062,319.53	--
878125	Constellation Justice Systems 1005	\$112,421.08	--
878125	E FIT 1018	\$72,387.14	--
878125	EZ FACILITY 1010 1010	\$153,624.13	--

page 1 of 2

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1 DC Only



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Welcome: Pat McGowen Last Login: 01/04/2012 at 09:45 AM EST

[Company Code Name]

Print

POTENTIAL BANNER

POTENTIAL BANNER

Relationship Summary

Print

DC Plans Last Valuation: 01/31/12

Plan Name	Plan Number	Total Participants	Balance	YTD Contribution
A Insurance Corp	176767	22,999	\$999.99	\$36,432.22
ABC Company	999999	40	\$99.99	\$4,36,432.22
TRS of Bennett Giuliano McDonnell & Perrone LLP	GH1233	3,333,909	\$9.99	\$36,432.22
TRS of the Center for Allied Health & Nursing	2314212	433	\$0.99	\$36,432.22
TRS of Wilkofsky Friedman Karel & Cummins 401K	1234756	4,392	\$9,889,999.99	\$36,432.22
YaY Company	123456*	45,202	\$9,555,999.52	\$10,36,432.22
YBB Company	993339	434	\$9,444,999.78	\$432.22
ZRS of Bennett Giuliano McDonnell & Perrone LLP	GH1243	233,339	\$9,554,999.99	\$32.22
ZRS of the Center for Allied Health & Nursing	144444	1,292	\$9,444,444.45	\$2.25
ZRS of Wilkofsky Friedman Karel & Cummins 401K	123456*	3	\$9,111,999.02	\$.94

Total Relationship 10 Plans 9,999,999 \$99,999,333.22 \$19,237,343.95

* DIVSUBS values are not included in these totals For accuracy, calculate your DIVSUB totals separately and apply the results herein.

View All Participants >> | View All Plans >>

SEARCH

Plan Participant

Last Name: First Name:

Employee ID No. Or Last 4 digits of SSN:

Partial strings at a minimum of 4 characters are accepted, but may result in a higher number of responses

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- Totla Conde Pra-sem
- Perulius
- Corls

xx/xx/xxxx - Sed do eismod.Lorem ipsum dolor sit amet, consectetur addipiscing eid. Sed do eismod.

Distributions

Relationship Summary Open Items:

Loan Issue Request 5

Withdrawal Request 1

Termination Request 0

Initiate a New Request >>

View All Work Items >>

News Center

October Reporting Updates Loreem ipsum dolor sit. Learn More >>

Recent Changes to Withdrawal and Termination Form Lorem ipsum dolor sit amet, consectetur addipiscing eid. Sed do eismod. Learn More >>

The ING Community Fund Community Awards helping public school students combat obesity. 50 schools! 24 States!

Relationship Summary

DC Plans Last Valuation: 01/31/12

Plan Name	Plan Number	Number of Participants	Total Balance	YTD Contribution
A Insurance Corp	176767	22,999	\$999.99	\$36,432.22

Total Relationship 1 Plan 22,999 \$999.99 \$136,432.22

* DIVSUBS values are not included in these totals For accuracy, calculate your DIVSUB totals separately and apply the results herein.

4

Single plan example - note this does not include "View All Plans," View All Participants," nor "Edit Favorite Plans" links.

Notes/Annotations

2 DB & DC Mixed Variation

Relationship Summary

DC Plans Last Valuation: 09/31/11

Plan Name	Plan Number	Number of Participants	Total Balance	YTD Contribution
A Insurance Corp	123456	22,928	\$9,999,999.99	\$36,432.22
ABC Company - Divs Sub Lorem Ipsum Dolor	999999	234	18	\$2,444,432.22
ABC Company - Divs Sub Lorem Ipsum Dolor	999999	234	18	\$2,444,432.22
ABC Company - Divs Sub Lorem Ipsum Dolor	999999	234	18	\$2,444,432.22
TRS of Bennett Giuliano McDonnell & Perrone LLP	GH1233	928	\$9,999,999.99	\$36,432.22
TRS of the Center for Allied Health & Nursing	123456	10,928	\$9,999,999.99	\$36,432.22

DC Plans Total Relationship 3 Plans 24,999 \$99,999,333.22 \$10,283,322.33

DB Plans Last Valuation: 12/31/12

Plan Name	Plan Number	Number of Participants	Retirees Receiving Payments	Term Vested
TRS of Wilkofsky Friedman Karel & Cummins 401K	123456	63,004	3,209	345
ABC Company - Divs Sub Lorem Ipsum Color	999999	234	18	1,000
ABC Company - Divs Sub Lorem Ipsum Dolor	999999	234	18	32
ABC Company - Divs Sub Lorem Ipsum Folor	999999	234	18	23

DB Plans Total Relationship 2 Plans 66,229 3,347 1,403

* DIVSUBS values are not included in these totals For accuracy, calculate your DIVSUB totals separately and apply the results herein.

View All Participants >> | View All Plans >>

3 DB Only

Relationship Summary

DB Plans Last Valuation: 12/31/11

Plan Name	Plan Number	Number of Participants	Retirees Receiving Payments	Term Vested
AAA of Wilkofsky Friedman Karel & Cummins 401K	123456	63,004	3,209	23,234
ABC Company - Divs Sub Lorem Ipsum Color	999999	234	18	32,341
ABC Company - Divs Sub Lorem Ipsum Dolor	999999	4	4	231
ABC Company - Divs Sub Lorem Ipsum Folor	999999	2,404	192	12
DEF of Wilkofsky Friedman Karel & Cummins 401K	123456	63,004	3,209	123
PDF Company - Divs Sub Ipsum Color	999999	234	18	6,432
PDF Company - Divs Sub Ipsum Dolor	999999	234	18	123
PDF Company - Divs Sub Ipsum Folor	999999	234	18	23
TRS of Wilkofsky Friedman Karel & Cummins 401K	123456	63,004	3,209	4
XYZ Company - Divs Sub Lorem Ipsum TTT	999999	234	18	2,341

DB Plans Total Relationship 6 Plans 66,229 3,347 66,321

* DIVSUBS values are not included in these totals For accuracy, calculate your DIVSUB totals separately and apply the results herein.

View All Participants >> | View All Plans >>

When there are less than 11 possible Plan or Divs Subs rows to display in the Sponsors Total Relationship, there is no need to show buttons for "Edit Top Plans" nor "View All Plans".



[Company Code Name]

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POTENTIAL BANNER

Distributions

Relationship Summary

Relationship Summary
Open Items:

Loan Issue Request	5
Withdrawal Request	1
Termination Request	0

[Initiate a New Request >>](#)

[View All Work Items >>](#)

Total Relationship	254 Plans	19,999,999	\$199,999,333.22	\$119,237,343.95
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* DIVSUBS values are not included in these totals. For accuracy, calculate your DIVSUB totals separately and apply the results herein.

[Select Top Plans >>](#) | [View All Participants >>](#) | [View All Plans >>](#)

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- Totla Conde Pra-sem
- Perulius
- Corls

xx/xx/xxxx - Sed do eiusmod.Lorem

October Reporting Updates

Loreem ipsum dolor sit. [Learn More >>](#)

Learn More >>

Community Awards helping public school students combat obesity.

- 50 schools

2 Single plan example. The User CAN choose to only select one Favorite Plan - even if they have more than 10 to choose from.

Information as of 02/21/2012

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DC Plans *Last Valuation: 09/31/11*

Plan Name	Plan Number	Number of Participants	Total Balance	YTD Contribution
A Insurance Corp	123456	22,928	\$9,999,999.99	\$36,432.22
ABC Company – Divs Sub Lorem Ipsum Dolor	999999	234	18	\$2,444,432.22
ABC Company – Divs Sub Lorem Ipsum Dolor	999999	234	18	\$2,444,432.22
ABC Company – Divs Sub Lorem Ipsum Dolor	999999	234	18	\$2,444,432.22
TRS of Bennett Giuliano McDonnell & Perrone LLP	GH1233	928	\$9,999,999.99	\$36,432.22
TRS of the Center for Allied Health & Nursing	123456	10,928	\$9,999,999.99	\$36,432.22

Total Relationship	21 Plans	22,999	\$999.99	\$36,432.22
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* DIVSUBS values are not included in these totals. For accuracy, calculate your DIVSUB totals separately and apply the results herein.

[Select Top Plans >>](#) | [View All Participants >>](#) | [View All Plans >>](#)

Plan Name	Plan Number	Number of Participants	Retirees Receiving Payments	Term Vested
TRS of Wilkofsky Friedman Karel & Cummins 401K	123456	63,004	3,209	343
ABC Company – Divs Sub Lorem Ipsum Color	999999	234	18	5,643
ABC Company – Divs Sub Lorem Ipsum Dolor	999999	234	18	12
ABC Company – Divs Sub Lorem Ipsum Folor	999999	234	18	23,564

DB Plans Total Relationship	2 Plans	66,229	3,347	30,231
-----------------------------	---------	--------	-------	--------

[Edit Top Plans >>](#) | [View All Participants >>](#) | [View All Plans >>](#)

DB Plans *Last Valuation: 12/31/11*

Plan Name	Plan Number	Total Participants	Retirees Receiving Payments	Term Vested
AAA of Wilkofsky Friedman Karel & Cummins 401K	333333*	63,004	3,209	3,412
ABC Company – Divs Sub Lorem Ipsum Color	888888	234	18	21,123
ABC Company – Divs Sub Lorem Ipsum Dolor	777777	4	4	2472
ABC Company – Divs Sub Lorem Ipsum Folor	666666	2,404	192	4312
DEF of Wilkofsky Friedman Karel & Cummins 401K	333333*	63,004	3,209	432
PDF Company – Divs Sub Ipsum Color	555555	234	18	452
PDF Company – Divs Sub Ipsum Dolor	444444	234	18	5,432
PDF Company – Divs Sub Ipsum Folor	111111	234	18	342
TRS of Wilkofsky Friedman Karel & Cummins 401K	333333*	63,004	3,209	45
XYZ Company – Divs Sub Lorem Ipsum TTT	222222	234	18	3

* DIVSUBS values are not included in these totals. For accuracy, calculate your DIVSUB totals separately and apply the results herein.

[Select Top Plans >>](#) | [View All Participants >>](#) | [View All Plans >>](#)



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[Company Code Name]

Welcome: Pat McGowen Last Login: 01/04/2012 at 09:45 AM EST

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POTENTIAL BANNER

POTENTIAL BANNER

Relationship Summary

DC Plans Last Valuation: 12/31/11

Plan Name	Plan Number	Number of Participants	Total Balance	YTD Contribution
A Insurance Corp	123456	22,928	\$9,999,999.99	\$36,432.22
TRS of Bennett Giuliano McDonnell & Perrone LLP	GH1233	928	\$9,999,999.99	\$36,432.22
TRS of the Center for Allied Health & Nursing	123456	10,928	\$9,999,999.99	\$36,432.22

DC Plans Total Relationship 3 Plans 34,784 \$28,987.876.77 \$109,296.66

DB Plans Last Valuation: 02/13/11

Plan Name	Plan Number	Number of Participants	Term Vested	Retirees Receiving Payments
TRS of Wilkofsky Friedman Karel & Cummins 401K	123456	63,004	33,454	3,454
ABC Company – Divs Sub Lorem Ipsum Dolor	999999	234	383	18

DB Plans Total Relationship 2 Plans 63,238 33,227 3,837

Select Top Plans >> View All Participants >> | View All Plans >>

SEARCH

Plan Participant

Last Name: First Name:

OR

Employee ID No. Last 4 digits of SSN:

Partial strings at a minimum of 4 characters are accepted, but may result in a higher number of responses.

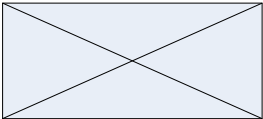
search

PlanFirst Online

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Market Snapshot

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Distributions

Relationship Summary Open Items:

Loan Issue Request 5
Withdrawal Request 1
Termination Request 0

Initiate a New Request >>

View All Work Items >>

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The ING Community Fund
Community Awards helping public school students combat obesity.
50 schools!
24 States!
Over 63,000 students!
Learn More >>

Lorem Ipsum Dolor Set!
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Learn More >>

SAS 70 Report Details to Include Additional Regulatory Data
Lorem ipsum dolor sit. Learn More >>

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POTENTIAL BANNER

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[Company Code Name]

Welcome: **Pat McGowen** Last Login: 01/04/2012 at 09:45 AM EST



POTENTIAL BANNER

POTENTIAL BANNER

☒ Relationship Summary

DC Plans *Last Valuation: 12/31/11*

Plan Name	Plan Number	Number of Participants	Total Balance	YTD Contribution
A Insurance Corp	123456	22,928	\$9,999,999.99	\$36,432.22
TRS of Bennett Giuliano McDonnell & Perrone LLP	GH1233	928	\$9,999,999.99	\$36,432.22
TRS of the Center for Allied Health & Nursing	123456	10,928	\$9,999,999.99	\$36,432.22

DC Plans Total Relationship	3 Plans	34,784	\$28,987.876.77	\$109,296.66
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DB Plans *Last Valuation: 12/31/11*

Plan Name	Plan Number	Number of Participants	Retirees Receiving Payments	Term Vested
TRS of Wilkofsky Friedman Karel & Cummins 401K	123456	63,004	3,209	33,454
ABC Company – Divs Sub Lorem Ipsum Dolor	999999	234	18	383

DB Plans Total Relationship	2 Plans	63,238	3,227	33,837
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[View All Participants >>](#) | [View All Plans >>](#)

SEARCH

☐ Plan ☒ Participant

Last Name: _____ First Name: _____

OR

Employee ID No. Last 4 digits of SSN:

Partial strings at a minimum of 4 characters are accepted, but may result in a higher number of responses.

[search](#)

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Testing** Sit amet, do eiusmod.

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- Perulius
- Corls

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Edit Favorite Plans

To change your Favorite Plans list, select up to 15 plans* to appear within your Book of Business dashboard. Plans will appear in alphabetical order, separated between DB and DC plan types.

1

Relationship Summary

DB Plans

Last Valuation: 12/31/11

Plan Name	Plan Number	Total Participants	Retirees Receiving Payments	Term Vested
AAA of Wilkofsky Friedman Karel & Cummins 401K	123456	63,004	3,209	3,412
ABC Company – Divs Sub Lorem Ipsum Color	999999	234	18	21,123
ABC Company – Divs Sub Lorem Ipsum Dolor	999999	4	4	2472
ABC Company – Divs Sub Lorem Ipsum Folor	999999	2,404	192	4312
DEF of Wilkofsky Friedman Karel & Cummins 401K	123456	63,004	3,209	432
PDF Company – Divs Sub Ipsum Color	999999	234	18	452
PDF Company – Divs Sub Ipsum Dolor	999999	234	18	5,432
PDF Company – Divs Sub Ipsum Folor	999999	234	18	342
TRS of Wilkofsky Friedman Karel & Cummins 401K	123456	63,004	3,209	45
XYZ Company – Divs Sub Lorem Ipsum TTT	999999	234	18	3
DB Plans Total Relationship	7 Plans	66,229	3,347	33,393

2

Plans

Search by: Plan Number

Add Search

SEARCH

CLEAR

3

Display Alphabetically

Clear All

Reset

Save

6

	Plan Type	Plan Name	Plan #	PPTs
☐	DB	401 HOTEL 401(K) PLAN	876957-12392	62
☒	DB	A Insurance Corp	369258	4
☒	DB	ABC Company	565011	66
☒	DB	HOULIHAN LAWRENCE, INC.	887074	77
☐	DC	TRS OF THE CENTER FOR ALLIED HEALTH & NURS	123456	35
☐	DC	TRS of Wilkofsky Friedman Karel & Cummins 401K	789456	8
☐	DC	TRS of Bennett Giuliano McDonnell & Perrone LLP	147258	56

7

8

Clear All

Reset

Save

1

The currently saved Top Lists pagelet view appears here for the user's reference.

2

Same plan search/filter options that appear in the plan info section. See "Plan List" wireframe for complete list of Pulldown options and specifications.

3

The user can reset all ten items at once by clicking "Clear All". This will leave all rows unselected. This action will only take effect once the user selects the "Save" button.

4

The Reset button will return this screen to the most recently SAVED version.

5

The page can be manipulated and re-set until the user selects "Save". Upon "Save" the Current Dashboard View box refreshes to illustrate the new configuration.

6

The user must manually enter a check beside each they want to include. They must also manually uncheck any items they wish to exclude.

7

No Pagination. The User's Plan list will scroll to display all plans within this one screen.

8

If user selects more than 10 Plans including a mix of DB and DC, an error message will alert them to the limitation.

Drop Down

By Plan Name
By Plan Type
By Participant Count
By Core Balance

4

5



Edit Favorite Plans

To change your Favorite Plans list, select up to 10 plans* to appear within your Book of Business dashboard. Plans will appear in alphabetical order, separated between DB and DC plan types.

Current Dashboard View

Relationship Summary

DC Plans

Last Valuation: 01/31/12

Plan Name	Plan Number	Total Participants	Balance	YTD Contribution
A Insurance Corp	176767	22,999	\$999.99	\$36,432.22
ABC Company	999999	40	\$99.99	\$4,36,432.22
TRS of Bennett Giuliano McDonnell & Perrone LLP	GH1233	3,333,909	\$9.99	\$36,432.22
TRS of the Center for Allied Health & Nursing	2314212	433	\$0.99	\$36,432.22
TRS of Wilkofsky Friedman Karel & Cummins 401K	1234756	4,392	\$9,889,999.99	\$36,432.22
YaY Company	123456*	45,202	\$9,555,999.52	\$10,36,432.22
YBB Company	993339	434	\$9,444,999.78	\$432.22
ZRS of Bennett Giuliano McDonnell & Perrone LLP	GH1243	233,339	\$9,554,999.99	\$32.22
ZRS of the Center for Allied Health & Nursing	144444	1,292	\$9,444,444.45	\$2.25
ZRS of Wilkofsky Friedman Karel & Cummins 401K	123456*	3	\$9,111,999.02	\$.94

Plans

Search by: Plan Number

Add Search

SEARCH

CLEAR

Clear All

Reset

Save

	Plan Type	Plan Name	Plan #	PPTs
☐	DB	401 HOTEL 401(K) PLAN	876957-12392	62
☒	DC	A Insurance Corp	369258	4
☒	DC	ABC Company	565011	66
☐	DC	A.F.L. PRINTING, INC.	874082	163
☐	DC	AARON PLUM INC RETIREMENT	874114	456
☐	DC	ADVOCATE BROKERAGE CORP.	875901-GH34348	1
☐	DC	HOTEL CHELSEA 401(K) PLAN	876120	858
☐	DB	HOULIHAN LAWRENCE, INC.	887074	77
☒	DC	TRS OF THE CENTER FOR ALLIED HEALTH & NURS	123456	35
☒	DC	TRS of Wilkofsky Friedman Karel & Cummins 401K	789456	8
☒	DC	TRS of Bennett Giuliano McDonnell & Perrone LLP	147258	56

Clear All

Reset

Save

* The Total of all Favorite Plans selections can not exceed 10 Plans.

1 The currently saved Top Lists pagelet view appears here for the user's reference.

2 Same plan search/filter options that appear in the plan info section. See "Plan List" wireframe for complete list of Pulldown options and specifications.

3 The user can reset all ten items at once by clicking "Clear All". This will leave all rows unselected. This action will only take effect once the user selects the "Save" button.

4 The Reset button will return this screen to the most recently SAVED version.

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6 The user must manually enter a check beside each they want to include. They must also manually uncheck any items they wish to exclude.

7 No Pagination. The User's Plan list will scroll to display all plans within this one screen.

8 If user selects more than 10 Plans including a mix of DB and DC, an error message will alert them to the limitation.



Edit Favorite Plans

To change your Favorite Plans list, select up to 15 plans* to appear within your Book of Business dashboard. Plans will appear in alphabetical order, separated between DB and DC plan types.

1

Current Dashboard View

Relationship Summary

By Favorite Plans

DC Plans

Last Valuation: 09/31/11

Plan Name	Plan Number	Total Participants	Balance	YTD Contribution
A Insurance Corp	123456	22,928	\$9,999,999.99	\$36,432.22
ABC Company – Divs Sub Lorem Ipsum Dolor	999999	234	18	\$2,444,432.22
ABC Company – Divs Sub Lorem Ipsum Dolor	999999	234	18	\$2,444,432.22
ABC Company – Divs Sub Lorem Ipsum Dolor	999999	234	18	\$2,444,432.22
TRS of Bennett Giuliano McDonnell & Perrone LLP	GH1233	928	\$9,999,999.99	\$36,432.22
TRS of the Center for Allied Health & Nursing	123456	10,928	\$9,999,999.99	\$36,432.22

DB Plans

Last Valuation: 12/31/12

Plan Name	Plan Number	Total Participants	Retirees Receiving Payments	Term Vested
TRS of Wilkofsky Friedman Karel & Cummins 401K	123456	63,004	3,209	343
ABC Company – Divs Sub Lorem Ipsum Color	999999	234	18	5,643
ABC Company – Divs Sub Lorem Ipsum Dolor	999999	234	18	12
ABC Company – Divs Sub Lorem Ipsum Folor	999999	234	18	23,564

2

Plans

Search by: Plan Number

Add Search

SEARCH

CLEAR

3

4

5

Display Alphabetically

Clear All

Reset

Save

6

☐	Plan Type	Plan Name	Plan #	PPTs
☐	DB	401 HOTEL 401(K) PLAN	876957-12392	62
☐	DC	A Insurance Corp	369258	4
☐	DC	ABC Company	565011	66
☐	DC	TRS of Wilkofsky Friedman Karel & Cummins 401K	789456	8
☐	DC	TRS of Bennett Giuliano McDonnell & Perrone LLP	147258	56

7

Clear All

Reset

Save

8

* The Total of all Favorite Plans selections can not exceed 10 Plans.

- 1
- The currently saved Top Lists pagelet view appears here for the user's reference.
- 2
- Same plan search/filter options that appear in the plan info section. See "Plan List" wireframe for complete list of Pulldown options and specifications.
- 3
- The user can reset all ten items at once by clicking "Clear All". This will leave all rows unselected. This action will only take effect once the user selects the "Save" button.
- 4
- The Reset button will return this screen to the most recently SAVED version.
- 5
- The page can be manipulated and re-set until the user selects "Save". Upon "Save" the Current Dashboard View box refreshes to illustrate the new configuration.
- 6
- The user must manually enter a check beside each they want to include. They must also manually uncheck any items they wish to exclude.
- 7
- No Pagination. The User's Plan list will scroll to display all plans within this one screen.
- 8
- If user selects more than 10 Plans including a mix of DB and DC, an error message will alert them to the limitation.

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Summary

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Plan List

Plans

Search by: Plan Number

Add Search

SEARCH

CLEAR

Summary: As of 02/22/2012

Number of DC Plans: 561

Number of DB Plans: 11

Number of Participants: 22,142

Number of Participants: 1,383

Total Balance: \$273, 393.39

(+) Unallocated Balances:

Export Data:   

561 Results Found

View All 1-20 21-40 41-60 >>

Plan Number	Plan Name	Number of Participants	Issue Date	Core Balance	Non Core Balance	
876957	401 HOTEL 401(K) PLAN	62	05-05-2011	\$1,675,751.69	\$134,903.22	View Plan Summary View Participants
874082	A.F.L. PRINTING, INC.	163	12-06-2011	\$3,199,584.85	\$0.00	View Plan Summary View Participants
874114	AARON PLUM INC RETIREMENT	5	12-14-2011	\$0.00	\$0.00	View Plan Summary View Participants
875901	ADVOCATE BROKERAGE CORP.	35	12-19-2011	\$1,759,563.77	\$6,323.17	View Plan Summary View Participants
877217	AG SAVINGS & INVESTMENT PLAN	257	10-30-2009	\$17,752,392.84	\$18,924,775.30	View Plan Summary View Participants
877002	BERNSTEIN LITOWITZ BERGER	131	10-02-2009	\$5,838,826.16	\$191,832.85	View Plan Summary View Participants
877080	BERNSTEIN LITOWITZ BERGER	133	10-02-2009	\$5,838,826.16	\$191,832.85	View Plan Summary View Participants
877081	BERNSTEIN LITOWITZ BERGER	21	10-02-2009	\$1,685,147.89	\$0.00	View Plan Summary View Participants
888572	BRANT PUBLICATIONS, INC	2	04-08-2002	\$0.00	\$0.00	View Plan Summary View Participants
877340	BRANT PUBLICATIONS, INC,	77	11-19-2009	\$4,638,412.61	\$100,737.39	View Plan Summary View Participants
888690	BUTLER ROGERS BASKETT	63	11-01-2002	\$2,634,994.90	\$26,610.30	View Plan Summary View Participants
877688	C & C AFFORDABLE	29	03-30-2010	\$658,562.89	\$3,514.28	View Plan Summary View Participants

View All 1-20 21-40 41-60 >>

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Plan Number

Plan Name

State

Product

Plan Manager

Core Balance between

Non Core Balance between

Total Balance between

Issue Date between

Map Plus

Map V

MAP Select

Retirement Plus

Voluntary TDA

Plan Number

Plan Name

State

Product

Plan Manager

Core Balance between

Non Core Balance between

Total Balance between

Issue Date between

CA

CON

CT

DC

FL

GA

IL

LA

MA

MD

NH

NJ

NY

OK

PA

TN

TX

WV

XX

Plan Number

Plan Name

State

Product

Plan Manager

Core Balance between

Non Core Balance between

Total Balance between

Issue Date between

Benjamin Velevitch

Brian J Griswold

Catherine E Ferreri

Deborah E Walter

Erin Elizabeth Manning

James Bordonaro

John Paolino

Kerry L Harrelle

Lisa J Marth

Mary A Falco

Paul D Pedroncelli

Paul Pedroncelli

Yahaira Joann Ortega

Plan Number

Plan Name

State

Product

Plan Manager

Core Balance between

Non Core Balance between

Total Balance between

Issue Date between

and

Issue Date between

From

1

1994

To

12

2011

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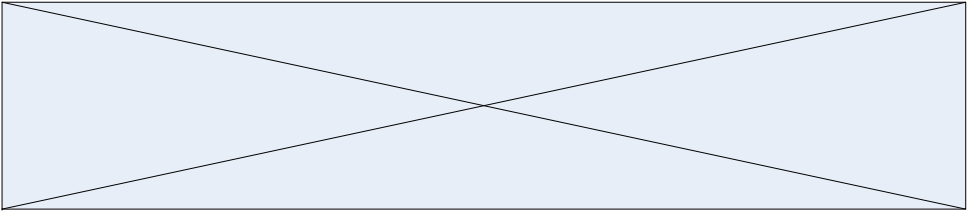
Welcome: **Pat McGowen** Last Login: 01/04/2012 at 09:45 AM EST

[<< Relationship Summary](#) [<< News Archives](#)

Vestibulum eu nisl non mi egestas bibendum sit amet a elit

12-22-2011

Dateline (if applicable) - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed tellus tellus, tincidunt eget pretium eu, tempor vel libero. Etiam lacus metus, sollicitudin sit amet faucibus eu, viverra nec neque. Fusce id imperdiet turpis. Donec rutrum nibh vel eros porttitor faucibus. Aliquam posuere lobortis turpis, sit amet porttitor augue luctus nec. Donec tristique ullamcorper nisl sit amet suscipit. Pellentesque in justo in velit vulputate fringilla. Nulla dolor est, fermentum id cursus non, sodales in purus. In porttitor condimentum volutpat. Sed semper tincidunt erat, ut porttitor metus tempus non.



Mauris semper ipsum scelerisque magna mattis facilisis. ~~Curabitur~~ Curabitur accumsan libero a tellus vulputate in consequat erat condimentum. Suspendisse blandit gravida mauris, eu eleifend quam sodales eget. Ut condimentum felis nec risus interdum vehicula adipiscing velit volutpat. Phasellus varius fringilla sapien, vel scelerisque orci placerat a. Sed a magna nibh, vestibulum consequat est. Phasellus nec augue ac elit placerat bibendum. Cras hendrerit rhoncus nunc eget sagittis. Duis luctus enim faucibus nisl pharetra condimentum. In ante velit, pretium vitae mattis id, convallis sit amet eros. Vivamus pharetra porta eros, vitae facilisis arcu lacinia ut. Nam tristique vulputate dictum. Nulla quis dignissim arcu.

Etiam ac quam vel massa euismod fringilla semper ut felis. Nunc et blandit tellus. Pellentesque convallis, arcu sed varius sodales, tellus lectus pharetra mi, convallis aliquet dolor dolor sed neque. Nunc non massa urna. Phasellus quis nisl vel urna venenatis ornare vel ac mi.

Donec pellentesque pulvinar orci nec sodales. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Duis vel feugiat felis. [Lorem Ipsum](#)

223 px

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Looking for customer service or broader financial guidance? We'd love to talk to you!

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ING Study: Cultural Influences Impact Retirement...

Estudio de ING: Las influencias culturales tienen...

ING Launches New Retirement Income Program to...

ING U.S. Encourages More Consumers to Make...

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RSS Feeds

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All Press Releases

Brand Marketing

Corporate

Corporate Responsibility

Insurance

Investment Management

Retirement

Media Highlights

All Media Highlights

What are RSS feeds?

Bullet Items and Annotated Title

Title Lorem Ipsum Dolor Set Surot Coloa Plu Derious

Proin sit amet enim sit

Item A

Item B

Item C

Item D

Item E

Item Title with Annotation

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Proin sit amet enim sit amet urna cursus rutrum id in turpis.

More >>

Leo Reta >>

Title Within Image and Title with Annotation

Title Lorem Ipsum Dolor Set Surot Coloa Plu Derious

Item Title with Annotation

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Proin sit amet enim sit amet urna cursus rutrum id in turpis.

More >>

Leo Reta >>

Main Title and 3 Annotated Titles

Title Lorem Ipsum Dolor Set

Item Title with Annotation

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Proin sit amet enim sit amet urna cursus rutrum id in turpis.

More >>

Item Title with Annotation

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Proin sit amet enim sit amet urna cursus rutrum id in turpis.

More >>

Item Title with Annotation

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Proin sit amet enim sit amet urna cursus rutrum id in turpis.

More >>

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697 px

TPA TIP #2: Access your Participant Lists More Quickly

Jump directly to your Top Plans' Participant List Screens. Just select the PPT number on your Top Plans entries below.

Top Plans

Plan Number

PPTs

Cor. Balance

5655

66

\$7,12,123.00

123456



Tools & Calculators

To build solid results, you need the right tools.

Get Started >>

Title with Bullets and Image, Annotated Title, and Small Image Annotated Title

Title Lorem Ipsum Dolor Set Surot Coloa Plu Derious

Proin sit amet enim sit

Item A

Item B

Item C

Item D

Item E

Item Title with Annotation

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Proin sit amet enim sit amet urna cursus rutrum id in turpis.

More >>

Item Title with Annotation

Proin sit amet enim sit amet urna cursus rutrum id in turpis.

More >>

Leo Reta >>

Three Image Variations with and without Annotation

Title Lorem Ipsum Dolor Set

Item Title with Annotation

Item Title with Annotation

Proin sit amet enim sit amet urna cursus rutrum id in turpis.

More >>

Item Title with Annotation

Leo Reta >>

Bullet Items with Annotation

Title Lorem Ipsum Dolor Set Surot Coloa Plu Derious

Proin sit amet enim sit

Item A - Lorem ipsum

Item B - Lorem ipsum dolor sit amet

Item C

Item D - Proin sit amet enim sit amet

Item E - Proin sit amet enim sit amet urna cursus rutrum id in turpis.

Leo Reta >>

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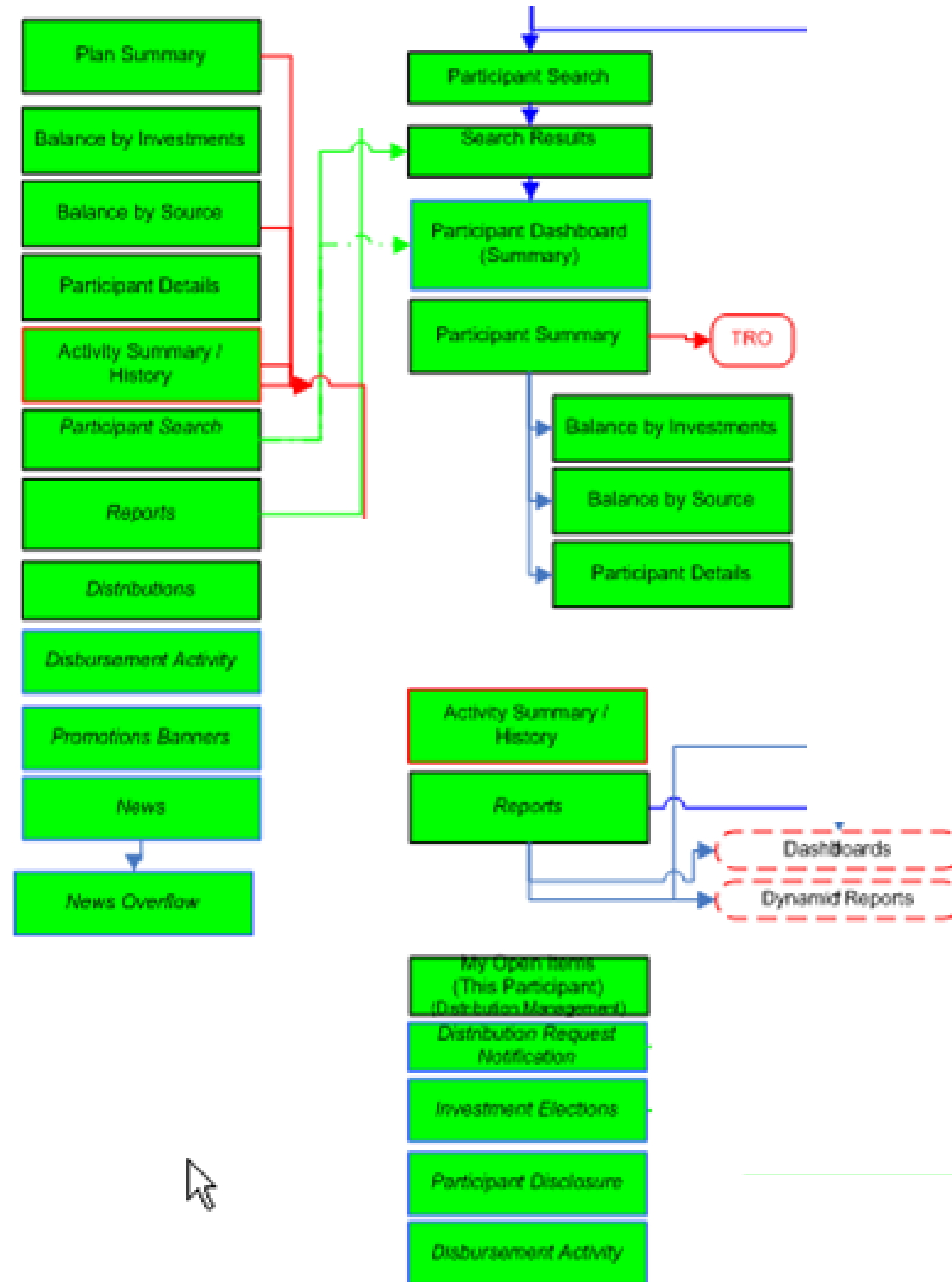
FEBRUARY 28, 2012

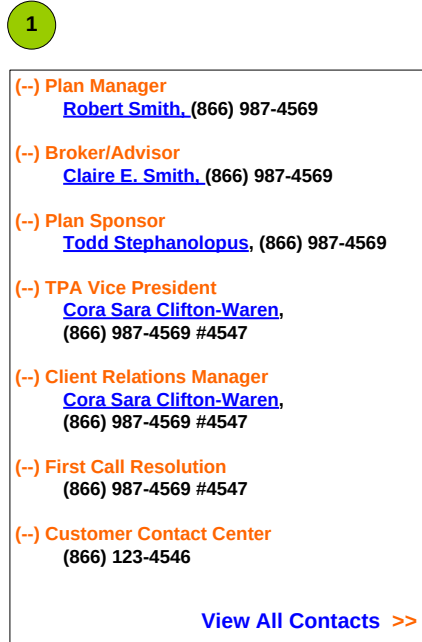
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CQ6406

Plan & Participant Dashboards and Sub Screens





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- Investment Info
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- Resources & Forms

TRS OF THE CENTER FOR ALLIED HEALTH & NURSING
06011

TRS of the Center For Alli 06011

Print Plan Snapshot

Plan Summary

Plan Address
P.O.Box 234
Hartford, CT 06159
(USA)

Plan Issue Date
10/10/1978
Plan Year End Date
12/31/2012

Total Plan Participants:
36,302
Plan Type:
401(k)

Information as of 02/21/2012

Print

Plan Details >> | View All Participants >>

Balance Information

As of 01/31/2012

Core Balance
\$46,000,999.00

Balance
\$43,234,333.19

Un-Allocated
\$3,000.00

Forfeiture Acct Balance
\$1,000.00

Suspense Acct Balance
\$2,000.00

Non-Core Balance
\$1,500,666.00

Loan Balance
\$33,493.19

Self-Directed Brokerage Account Balance
\$23,302.30

TOTAL Balance
\$49,523,478.11

Balance by Source

14.0% Money Market

7.9% Bonds

0% Multi-Class

43.7% Target Date Funds

19.7% Stocks

11.3% Company Stock

3.5% Other

14.0%

7.9%

0%

43.7%

19.7%

11.3%

3.5%

Show Results By

Distributions

Plan Level

Open Items:

Loan Issue Request 5

Withdrawal Request 1

Termination Request 0

Initiate a New Request >>

View All Work Items >>

Plan Contacts 1

(+) Plan Manager

(+) Broker/Advisor

(+) Plan Sponsor

(+) TPA Vice President

(+) Client Relations Manager

(+) First Call Resolution

View All Contacts >>

SEARCH

Plan

Participant

Last Name:

First Name:

Employee ID No.

Or Last 4 digits of SSN:

search

Plan Actions

Reports

> Participant Services Utilization

> Plan Assets

> YTD Contributions

> On-Demand Reporting

Actions

> Generate A Form

> Update/View Vesting

> Update Outside Assets

View All Reports >>

View All Processing Options >>

PlanFirst

Updates as of xx/xx/xxxx

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• Sed do eiusmod.Lorem ipsum dolor sit amet, consectetur addipiscing eid. Sed do eiusmod.

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1

(-) Plan Manager
Robert Smith, (866) 987-4569

(-) Broker/Advisor
Claire E. Smith, (866) 987-4569

(-) Plan Sponsor
Todd Stephanolopus, (866) 987-4569

(-) TPA Vice President
Cora Sara Clifton-Waren,
(866) 987-4569 #4547

(-) Client Relations Manager
Cora Sara Clifton-Waren,
(866) 987-4569 #4547

(-) First Call Resolution
(866) 987-4569 #4547

(-) Customer Contact Center
(866) 123-4546

View All Contacts >>

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Investment Info

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06011

TRS of the Center For Alli 06011

Print Plan Snapshot

Plan Summary

Plan Address
P.O.Box 234
Hartford, CT 06159
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Plan Issue Date
10/10/1978
Plan Year End Date
12/31/2012

Total Plan Participants:
36,302
Plan Type:
401(k)

Information as of 02/21/2012

Print

Plan Details >> | View All Participants >>

Balance Information

As of 01/31/2012

Core Balance

\$46,000.999.00

Balance

\$43,234,333.19

Un-Allocated

\$3,000.00

Forfeiture Acct Balance

\$1,000.00

Suspense Acct Balance

\$2,000.00

Non-Core Balance

\$1,500,666.00

Loan Balance

\$33,493.19

Self-Directed Brokerage Account Balance

\$23,302.30

TOTAL Balance

\$49,523,478.11

Balance by Source



14.0% Money Market
7.9% Bonds
0% Multi-Class
43.7% Target Date Funds
19.7% Stocks
11.3% Company Stock
3.5% Other

Show Results By ☐ \$ ☒ %

Balance by Source >> | Balance by Investment >> | Balance by Asset Class >>

SEARCH

Plan

Participant

Last Name:

First Name:

Employee ID No.

Or Last 4 digits of SSN:

Partial strings at a minimum of 4 characters are accepted, but may result in a higher number of responses.

search

Plan Actions

Reports

> Participant Services Utilization

> Plan Assets

> YTD Contributions

> On-Demand Reporting

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View All Reports >>

Actions

> Generate A Form

> Update/View Vesting

> Update Outside Assets

View All Processing Options >>

PlanFirst

Updates as of xx/xx/xxxx

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Sed do eismod. Lorem ipsum dolor sit amet, consectetur addipiscing eid. Sed do eismod.

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Plan Contacts

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(-) TPA Vice President

Cora Sara Clifton-Waren, (866) 987-4569 #4547

(-) Client Relations Manager

Cora Sara Clifton-Waren, (866) 987-4569 #4547

(-) First Call Resolution

(866) 987-4569 #4547

(-) Customer Contact Center

(866) 123-4546

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 Print

Plan Dashboard >>
Plan Details >>
Balance by Investment >>
Balance by Source >>

Plan Details

Plan Provisions as of 02/21/2012

Enrollment

• Online Enrollment

Y

• Auto Enroll Services

Y

Plan Services

• Contribution Rate Change

Y

• QDIA on File

Y

• QDIA Fund Name

Lorem Ipsum

• Fund Number

1920

• ING Sending Notices

N

• Vesting Tracking

ING

• Money Sources Available

Employer
Employee
Profit Sharing

Distribution Options

• Loans Allowed

Y

• # of Loans Allowed

#

• ING Monitoring for Defaults

Y

• Hardships Allowed

Y

• 59 ½

Y

• Normal Retirement

Y

• Age

Y

• Age Based

Y

• Non-Emergency

N

• Partial Termination

N

• TPA Distribution Fees

Loan
Withdrawal

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TRs OF THE CENTER FOR ALLIED HEALTH & NURSING06011

TRs of the Center For Alli06011

Print

Plan Dashboard >>Plan Details >>Balance by Investment >>Balance by Source >>

Total Investment Balance: \$23,116,700.23

Total Diversification: 249

Low Risk19Moderate200Aggressive30

YTD Contributions: \$2,399,483.20

18.19% - ING Fixed Account

13.37% - American Funds American Balanced FundA® - C

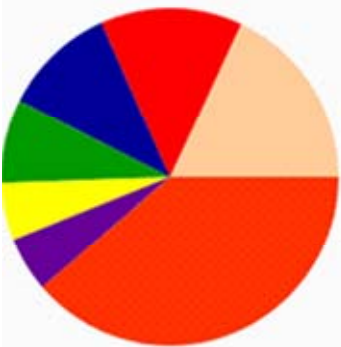
10.34% - American Funds Washington Mutual Investors F

8.21% - ING FIMCO Total Return Portfolio - Initial Class

5.66% - ING Solution 2045 Portfolio - Service Class

5.31% - ING Solution 2035 Portfolio - Service Class

37.91% - Other



01/31/2012

Month-End Date: Select...

Year: Select...

DISPLAY >

To view contributions¹ processed as of the last valuation date or as of a month-end, select an option, choose a date (if applicable) and click Display.

Fund Code	Fund	Risk Category	Asset Class	YTD Contributions	% of YTD Contributions	View Chart
939	AIM Charter Fund – Class A	Moderate	Bonds	\$25,300.00	2.53%	
392	Baron Asset Fund	Aggressive	Small / Mid / Specialty	\$23,000.00	4.54%	
123	Franklin Small-Mid Cap Growth Fund	Aggressive	Bonds	\$34,500.00	2%	
322	ING Bond Fund – Class A	Low Risk	Small / Mid / Specialty	\$4,000.00	3.22%	
393	Lorem Small Cap	Moderate	Small / Mid / Specialty	\$56.44	4.43%	
284	Molor Small-Mid Cap Growth	Moderate	Large Cap Value	\$6,000.00	11.4%	
947	Nostroдум Mid Asset	Moderate	Bonds	\$67,797.00	12.2%	
374	Oponesh Mid Asset	Aggressive	Small / Mid / Specialty	\$69,045.23	2%	
832	Quore Fund	Moderate	Small / Mid / Specialty	\$25,300.00	4%	
394	Research Remington Small-Mid Cap Fund	Moderate	Bonds	\$23,000.00	2.53%	
298	Research Remington Small – New Fund	Low Risk	Large Cap Value	\$34,500.00	4.54%	
100	Retired Q Fund	Aggressive	Aggressive	\$4,322.00	2%	
203	Retired T Fund	Aggressive	Aggressive	\$256.44	3.22%	
305	Semple Cap Asset Fund	Aggressive	Bonds	\$6,434.00	4.43%	
407	Semple Cap Fund	Aggressive	Bonds	\$3,797.00	11.4%	
500	Semple Mid-Cap Fund	Aggressive	Bonds	\$69,045.23	12.2%	
552	Templeton Fund Class A	Aggressive	Small / Mid / Specialty	\$23,444.00	4%	
443	Young Fund B	Low Risk	Bonds	\$34,655.00	2.53%	

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TRs of the Center For Alli06011

Plan Dashboard >>
Plan Details >>
Balance by Investment >>
Balance by Source >>
Balance by Asset Class >>
Plan Loan Details >>

Balance by Source

Total Source Balance: \$23,116,700.23

Series1 1 20.9611%

Series1 2 6.05 3%

Series1 3 35.6518%

Series1 4 14.87%

Series1 5 22.48 11%

Series1 6 10050%

1 COMPANY MATCH

9 ROLLOVER

A PRE-TAX

D PROFIT SHARING

G AFTER-TAX

Money Source	Balance	Vested Balance	Vested Percentage	*YTD Contributions
Employee				
Employee Pretax	\$20,000.00	\$10,000.00	10	\$11,000.00
Employee abcd	\$10,000.00	\$2,000.00	20	\$2,000.00
Employer				
Employer Pretax	\$12,000.00	\$4,000.00	12	\$4,000.00
Employer Matching	\$3,000.00	\$1,000.00	10	\$2,000.00
Total	\$45,000.00	\$17,000.00		\$19,000.00

01/31/2012

Month-End Date: Select... Year: Select...

DISPLAY >

* When ING is tracking vesting, the 'Vested Percentage' displayed takes into account prior withdrawals.

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 Print

Plan Dashboard >>Balance by Source

Plan Details >>Balance by Investment >>Balance by Source >>

Series1 120.9611%

Series1 26.053%

Series1 335.6518%

Series1 414.87%

Series1 522.4811%

Series1 610050%

1 COMPANY MATCH

9 ROLLOVER

A PRE-TAX

D PROFIT SHARING

G AFTER-TAX

Money Source	YTD Contributions	% of YTD Contributions ²
EMPLOYEE	\$750,000.00	75.00%
EMPLOYER	\$250,000.00	25.00%
Total	\$1,000,000.00	

To view contributions¹ processed as of the last valuation date or as of a month-end, select an option, choose a date (if applicable) and click Display.

☒ 01/31/2012

☐ Month-End Date:

Select...

 Year

Select...

DISPLAY >

ID	Source Name	Uninv. Cash	Market Value	Percent
1	COMPANY MATCH	\$0.00	\$25,269,224.90	20.96
9	ROLLOVER	\$0.00	\$7,298,628.48	6.05
A	PRE-TAX	\$0.00	\$42,970,404.41	35.65
D	PROFIT SHARING	\$0.00	\$17,913,968.38	14.86
G	AFTER-TAX	\$0.00	\$27,094,820.09	22.48
Total		\$0.00	\$120,547,046.26	100.00

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Plan Dashboard >>
Plan Details >>
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Balance by Source >>
Plan Loan Balance Details >>

Plan Loan Balance Details

Outstanding balances as of 02/21/2012

Total Outstanding Loan Balance\$2,329.00

Number of Loans3,678

Number of Participants with Loans3,200

1

“Number of loans” link pre-populates distributions filters within the “distributions” section of the site organizes by loans.

2

“Number of Participants with Loans” link pre-populates distributions filters within the “distributions” section of the site organized by participant name.

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Participant Search Results

Search by: Non Core Balance between

1

and

Add Search

SEARCH

CLEAR

Summary

Number of Participants: 23,300

Core Balance (as of 01-18-2012): \$4,931,148.62

Loan Balance (as of 01-18-2012): \$94,480.86

Total Balance: \$5,025,629.48

Back to Plan(s)

23,300 results found

Export Data:   

View All 1-20 21-40 41-60 > >>

Participant Name	SSN	Age	Core Balance	Non Core Balance	
ARCURE, ANTHONY R.	xxx-xx-5762	61.5	\$34,462.43	\$0.00	View Participant Summary View Participant Web Site View Balance Details View All Statements
ARCURE, GREGORY R.	xxx-xx-0499	37.2	\$9,406.36	\$0.00	View Participant Summary View Participant Web Site View Balance Details View All Statements
BOPP, JOHN J.	xxx-xx-1594	68.9	\$1,860.72	\$0.00	View Participant Summary View Participant Web Site View Balance Details View All Statements
BOTT, EVAN M	xxx-xx-5710	39.7	\$11,627.81	\$3,448.74	View Participant Summary View Participant Web Site View Balance Details View All Statements
BOVE, WILLIAM	xxx-xx-5851	67.9	\$146,784.43	\$10,771.08	View Participant Summary View Participant Web Site View Balance Details View All Statements
BRAGEN, THOMAS II	xxx-xx-0958	45.0	\$69,221.12	\$2,095.68	View Participant Summary View Participant Web Site View Balance Details View All Statements
BROWN, LAURA J.	xxx-xx-9626	47.2	\$31,845.94	\$16,694.20	View Participant Summary View Participant Web Site View Balance Details View All Statements

View All 1-20 21-40 41-60 > >>

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- First Name
- Last Name
- SSN (last 4 digits)
- Age between
- Core Balance between
- Non Core Balance between
- Total Balance between

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Participant List

Your search for C* yielded 400 Participant listings within this Plan.

Select one of the Participant results below. Or, to further refine your search results provide more specific search criteria and try again.

Search by: Non Core Balance between

1

and

Add Search

SEARCH

CLEAR

Core Balance (as of 01-18-2012): \$4,931,148.62

Loan Balance (as of 01-18-2012): \$94,480.86

Total Balance: \$5,025,629.48

Back to Plan(s)

148 Results Found for Filter(s)

Export Data:  

View All 1-20 21-40 41-60 >>

Participant Name	SSN	Age	Core Balance	Non Core Balance	
ARCURE, ANTHONY R.	xxx-xx-5762	61.5	\$34,462.43	\$0.00	View Participant Summary View Participant Web Site View Balance Details View All Statements
ARCURE, GREGORY R.	xxx-xx-0499	37.2	\$9,406.36	\$0.00	View Participant Summary View Participant Web Site View Balance Details View All Statements
BOPP, JOHN J.	xxx-xx-1594	68.9	\$1,860.72	\$0.00	View Participant Summary View Participant Web Site View Balance Details View All Statements
BOTT, EVAN M	xxx-xx-5710	39.7	\$11,627.61	\$3,448.74	View Participant Summary View Participant Web Site View Balance Details View All Statements
BOVE, WILLIAM	xxx-xx-5851	67.9	\$146,784.43	\$10,771.08	View Participant Summary View Participant Web Site View Balance Details View All Statements
BRAGEN, THOMAS II	xxx-xx-0958	45.0	\$69,221.12	\$2,095.68	View Participant Summary View Participant Web Site View Balance Details View All Statements
BROWN, LAURA J.	xxx-xx-9626	47.2	\$31,845.94	\$16,694.20	View Participant Summary View Participant Web Site View Balance Details View All Statements

View All 1-20 21-40 41-60 >>

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Participant Name

SSN (last four digits)

Plan Number

Plan Name

State

Product

Plan Manager

Core Balance between

Non Core Balance between

Total Balance between

Issue Date between

First and/or Last Name:

Participant Name

SSN (last four digits)

Plan Number

Plan Name

State

Product

Plan Manager

Core Balance between

Non Core Balance between

Total Balance between

Issue Date between

Last four SSN digits

Plan Number

Plan Name

State

Product

Plan Manager

Core Balance between

Non Core Balance between

Total Balance between

Issue Date between

Map Plus

Map V

MAP Select

Retirement Plus

Voluntary TDA

Plan Number

Plan Name

State

Product

Plan Manager

Core Balance between

Non Core Balance between

Total Balance between

Issue Date between

CA

CON

CT

DC

FL

GA

IL

LA

MA

MD

NH

NJ

NY

OK

PA

TN

TX

WV

XX

Plan Number

Plan Name

State

Product

Plan Manager

Core Balance between

Non Core Balance between

Total Balance between

Issue Date between

Benjamin Velevitch

Brian J Griswold

Catherine E Ferreri

Deborah E Walter

Erin Elizabeth Manning

James Bordonaro

John Paolino

Kerry L Harrelle

Lisa J Marth

Mary A Falco

Paul D Pedroncelli

Paul Pedroncelli

Yahaira Joann Ortega

Plan Number

Plan Name

State

Product

Plan Manager

Core Balance between

Non Core Balance between

Total Balance between

Issue Date between

Issue Date between

From

1

1994

To

12

2011

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Jennifer Carol Jones-Tupperman

XXX-XX-2432

TRS of the Center For Alli06011

Print Participant Snapshot

Participant Summary

Participant Address:
700 Main St
New York, NY 02005
(USA)

DOB: 10/22/1965
Age: 47
Hire Date: 06/01/2002
Status: ACTIVE

Date of Last Contribution: 01/31/2012
Last Contribution Amount: \$275.00
YTD Contribution: \$45,000.00

Participant Details >>

Balance Information

As of 01/31/2012

Total By Asset Class

Balance\$64,890.00
Loan Balance\$4,679.19
Self-Directed Brokerage Account Balance\$23,302.30
Life Insurance Balance\$1,356.00

TOTAL Balance\$74,895.49
Vested Balance\$74,895.49



14.0% Money Market

7.9% Bonds

0% Multi-Class

43.7% Target Date Funds

19.7% Stocks

11.3% Company Stock

3.5% Other

Show Results By

\$

%

Balance by Investment >>

Balance by Source >>

SEARCH

PlanParticipant

Last Name:First Name:

Employee ID No.Or Last 4 digits of SSN:

Partial strings at a minimum of 4 characters are accepted, but may result in a higher number of responses.

search

Participant Actions

Additional Inquiry Options

> Participant Statement

> Participant Transaction History

> View on Participant Website

Actions

> Request a Loan

> Request a Distribution

> Generate A Form

Distributions

Loan Issue Requests0

Withdrawal Requests0

Termination Requests0

View All Reports >>

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Participant Details >>

Balance by Investment >>

Balance by Source >>

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TRs of the Center For Alli06011

PPT Dashboard >>

Plan Details >>

Balance by Investment >>

Balance by Source >>

Loan Details >>

Participant Details

as of 02/21/2012

Termination Date	02/02/2013
Location Code & Name	123211 – Lorem Ipsum Dlories Contata
Phone #	800-364-4837
Email	personal@me.com
Years of Service	22
YTD Hours Worked	193
Hardship Suspension Date	NA
Beneficiary Information	Spouse
Available Loan Amount	\$23,000.33
Available Withdrawal Amount	\$23,000.33
Amortization Schedule - 	
Auto Enrolled	Y
QDIA Indicator	Y
Date of Last Contribution	02/01/2012
Amount of Last Contribution	\$343.00
After Tax Cost Basis:	Pre 87 after-tax

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Termination Date
Location Code & Name
Phone #
Email
Years of Service
YTD Hours Worked
Hardship Suspension Date
Beneficiary Information
Available Loan Amount
Available Withdrawal Amount
Amortization Schedule - this will be a link to a pdf
Auto Enrolled - Y/N
QDIA Indicator -Y/N
Date of Last Contribution
Amount of Last Contribution
After Tax Cost Basis:
 Pre 87 after-tax
 Post 86 after-tax
 Roth Cost Basis
Roth Start Date

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TRs of the Center For Alli06011

 Print

Change PPT

PPT Dashboard >>

Plan Details >>

Balance by Investment >>

Balance by Source >>

Loan Details >>

Jennifer Carol Jones-Tupperman

XXX-XX-2432

Balance by Investment

Total Investment Balance: \$116,700.23

Total Diversification: 22

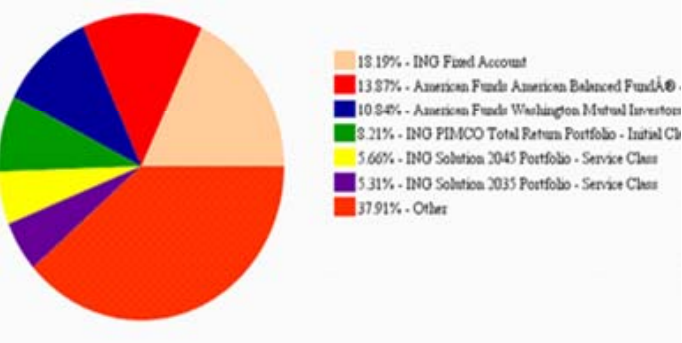
Low Risk 1

Moderate 18

Aggressive 3

Last Contribution: \$343.20

Date of Last Contribution: 02/02/2012



To view contributions¹ processed as of the last valuation date or as of a month-end, select an option, choose a date (if applicable) and click Display.

01/31/2012

Month-End Date:

Select...

Year

Select...

DISPLAY >

Fund CodeFundRisk CategoryAsset ClassYTD Contributions% of YTD Contributions

939AIM Charter Fund – Class AModerateBonds\$25,300.002.53%

392Baron Asset FundAggressiveSmall / Mid / Specialty\$23,000.004.54%

123Franklin Small-Mid Cap Growth FundAggressiveBonds\$34,500.002%

322ING Bond Fund – Class ALow RiskSmall / Mid / Specialty\$4,000.003.22%

947Nostroдум Mid AssetModerateBonds\$67,797.0012.2%

374Oponesh Mid AssetAggressiveSmall / Mid / Specialty\$69,045.232%

832Quore FundModerateSmall / Mid / Specialty\$25,300.004%

394Research Remington Small-Mid Cap FundModerateBonds\$23,000.002.53%

298Research Remington Small – New FundLow RiskLarge Cap Value\$34,500.004.54%

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Change PPT

Jennifer Carol Jones-Tupperman

XXX-XX-2432

Balance by Source

Total Source Balance: \$116,700.23

Last Contribution: \$343.20

Date of Last Contribution: 02/02/2012

1 COMPANY MATCH

9 ROLLOVER

A PRE-TAX

D PROFIT SHARING

G AFTER-TAX

Series1 120.9611%

Series1 26.053%

Series1 335.6518%

Series1 414.87%

Series1 522.4811%

EMPLOYEE\$750,000.0075.00%

EMPLOYER\$250,000.0025.00%

Total\$1,000,000.00

To view contributions¹ processed as of the last valuation date or as of a month-end, select an option, choose a date (if applicable) and click Display.

01/31/2012

Month-End Date: Select... Year: Select...

DISPLAY

ID	Source Name	Uninv. Cash	Market Value	Percent
1	COMPANY MATCH	\$0.00	\$25,269,224.90	20.96
9	ROLLOVER	\$0.00	\$7,298,628.48	6.05
A	PRE-TAX	\$0.00	\$42,970,404.41	35.65
D	PROFIT SHARING	\$0.00	\$17,913,968.38	14.86
G	AFTER-TAX	\$0.00	\$27,094,820.09	22.48
Total		\$0.00	\$120,547,046.26	100.00

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TRs of the Center For Alli06011

Print

Participant Dashboard >>Participant Details >>Balance by Investment >>Balance by Source >>Loan Balance Details >>

Jennifer Carol Jones-TuppermanXXX-XX-2432

Participant Loan Balance Details

Outstanding balances as of 02/21/2012

Total Outstanding Loan Balance\$3,099.25

Number of Loans2

Request Date	Participant Name	Loan Number	Request Type	Amount	Status
01/31/12	JENN C JONES-TUPPERMAN Xxx-xx-2432	45683	Withdrawal	\$5000.00	Current
03/12/08	JENN C JONES-TUPPERMAN Xxx-xx-2432	49686	Withdrawal - 59 ½	\$599.25	Past Due

LOAN DETAIL INFORMATION

Participant NameJennifer C Jones-Tupperman

SSNXXX-XX-2432

Loan TypeGeneral

Loan Number45683

Issue Date11/15/2011

Original Loan Amount\$5,000

Outstanding Principal Amount\$2,500

Payment Amount\$125.00

Interest Rate4%

Maturity Date11/15/2014

Last Payment Amount\$125.00

Last Payment Date02/01/12

StatusCurrent

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LOAN DETAIL INFORMATION

Participant Name

SSN

Loan Type

Loan Number

Issue Date

Original Loan Amount

Outstanding Principal Amount

Payment Amount

Interest Rate

Maturity Date

Last Payment Amount

Last Payment Date

Status - Payment overdue, Current etc.

Masked with last 4 showing

Residential or General

Example: 45683

11/15/2011

Example: \$5,000

Example: \$2,500

Example: \$125.00

Example: 4%

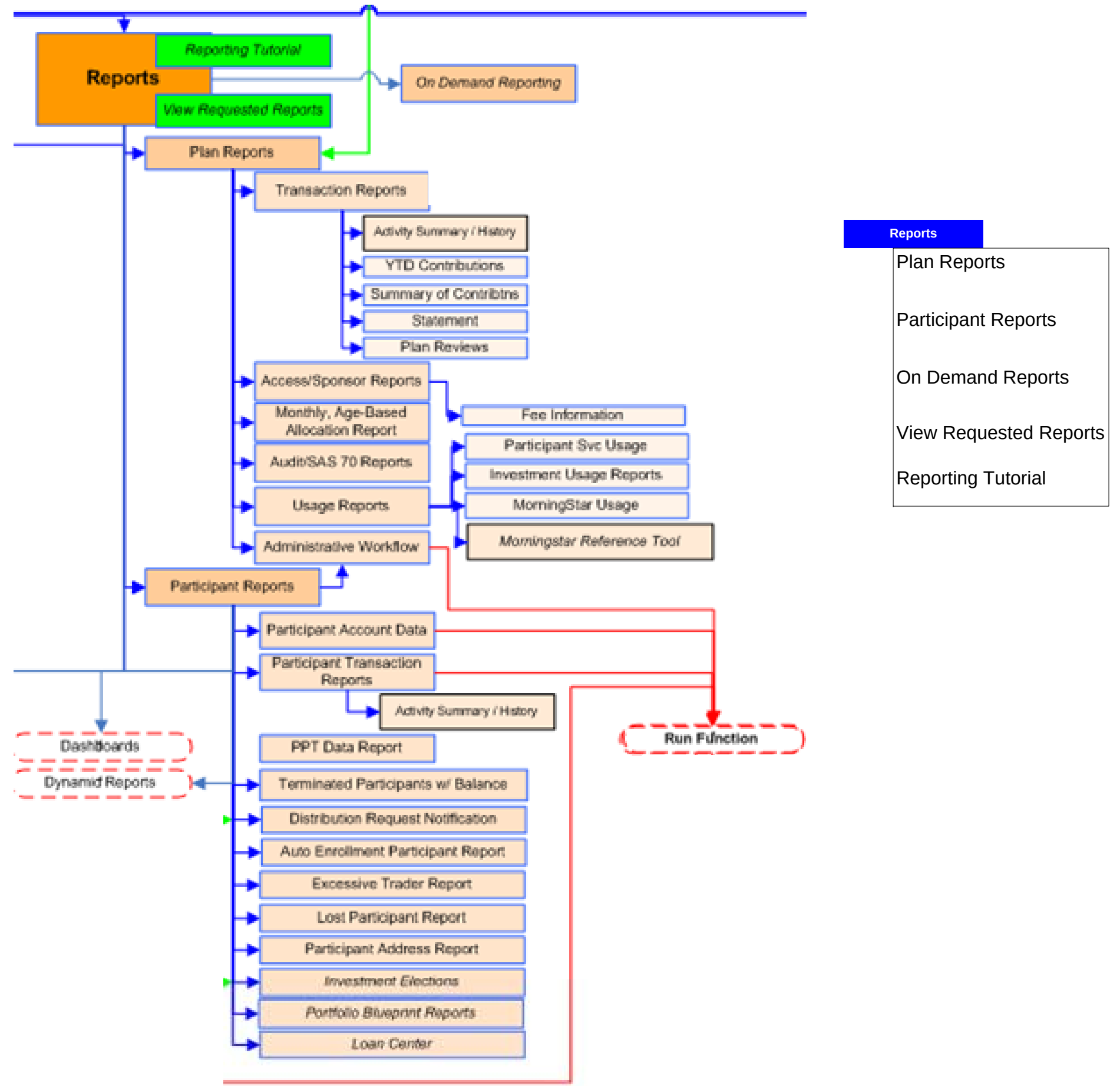
Example: 11/15/2014

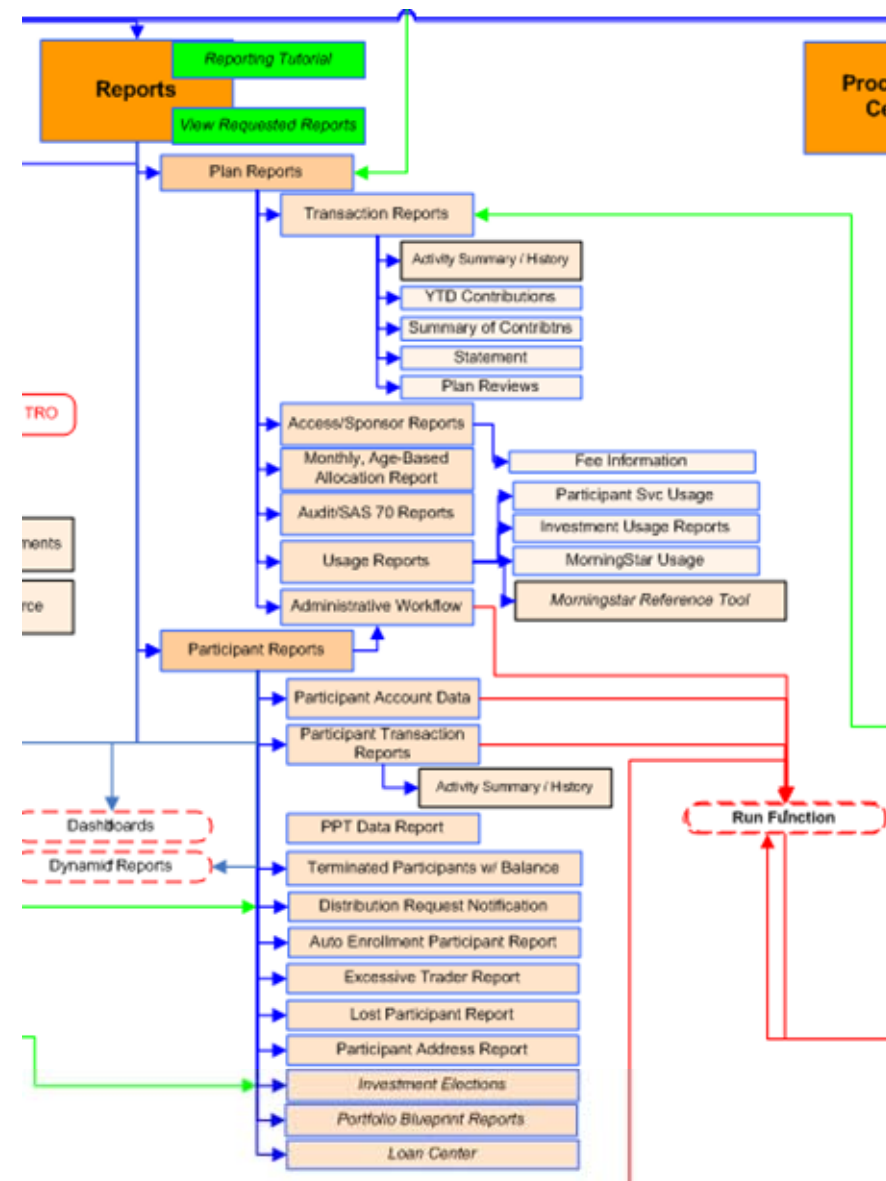
Example: \$125.00

Example: 02/01/12

Example: Current

CQ6405 Reports Screens





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- YTD Contributions
- Summary of Contributions
- Statements
- Plan Reviews

- Fee Information

- Monthly Age-Based Allocation Report

- Audit / SAS 70

- Participant Services Usage
- Investment Usage
- Morningstar Usage
- Morningstar Reference Tool

- Administrative Workflow

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> On Demand Reporting

> View Requested Reports

> Reporting Tutorial / Help

Plan Activity Summary

Printer Friendly View

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Enter Query Parameters

Start Date (mm/dd/ccyy):01/01/2012

End Date (mm/dd/ccyy):02/28/2012

Enter Fund ID (***) For All):*** OR

Select Investment / Source:

Submit Query

Code	Description	Market Value	Shares	Cost
000	OPENING BALANCE	\$185,550,195.82	10,738,327.5045	\$142,614,186.42
001	CONTRIBUTION	\$448,800.00	34,588.9360	\$448,800.00
098	GAIN/LOSS	\$23,314.45	0.0000	\$0.00
099	CLOSING BALANCE	\$186,022,310.27	10,772,916.4405	\$143,062,986.42

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- Activity History
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- Summary of Contributions
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- Monthly Age-Based Allocation Report

- Audit / SAS 70

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- Investment Usage
- Morningstar Usage
- Morningstar Reference Tool

- Administrative Workflow

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Plan Activity Summary

TRS OF THE CENTER FOR ALLIED HEALTH & NURSING
06011

Enter Query Parameters

Starting Date (mm/dd/ccyy)	01/01/2012
Investment Name	All
Money Source	COMPANY MATCH
Transaction:	Contributions

Submit Query

Activity History - Query Results

#	Trade Date	Investment	Money Source	Description	Cash	Shares
1	01/03/2012	STABLE VALUE	COMPANY MATCH	Contribution	2899.95	282.6449

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06011

TRs of the Center For Alli06011

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Auto Enrollment

Lost Participant

Participant Address Report

Investment Elections

Portfolio Blueprint Reports

Loan Center

Excessive Trader Report

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Participant Reports

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Participant Account Data

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Transaction Reports

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Terminicated Participants w/ Balance

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Distribution Request Notification

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Auto Enrollment

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Lost Participant Report

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Participant Address Report

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Investment Elections

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Portfolio Blueprints Reports

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Loan Center

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Excessive Trader Report

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TRS OF THE CENTER FOR ALLIED HEALTH & NURSING

06011

Jennifer Carol Jones-Tupperman

XXX-XX-2432

Enter Query Parameters

Start Date (mm/dd/ccyy):

01/01/2012

End Date (mm/dd/ccyy):

02/28/2012

Enter Fund ID (*** For All):

OR

Select Investment / Source:

1 - COMPANY MATCH

Submit Query

Code	Description	Market Value	Shares	Cost
000	OPENING BALANCE	\$56,361.50	2,379.9754	\$47,648.91
001	CONTRIBUTION	\$190.00	11.6584	\$190.00
098	GAIN/LOSS	- \$0.05	0.0000	\$0.00
099	CLOSING BALANCE	\$56,551.45	2,391.6338	\$47,838.91

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06011

Jennifer Carol Jones-Tupperman

XXX-XX-2432

Enter Query Parameters

Starting Date (mm/dd/ccyy)

01/01/2012

Investment Name

All

Money Source

COMPANY MATCH

Transaction:

All

Submit Query

Activity History - Query Results

#	Activity Date	Investment	Money Source	Activity	Amount	Units/Shares
1	01/03/2012	STABLE VALUE	COMPANY MATCH	Contribution	1.25	0.1218
2	"	BOND FUND	COMPANY MATCH	Contribution	0.50	0.0248
3	"	S&P 500 EQUITY INDEX	COMPANY MATCH	Contribution	0.50	0.0454
4	"	LARGE CAP EQUITY GROWTH FUND	COMPANY MATCH	Contribution	0.25	0.0074

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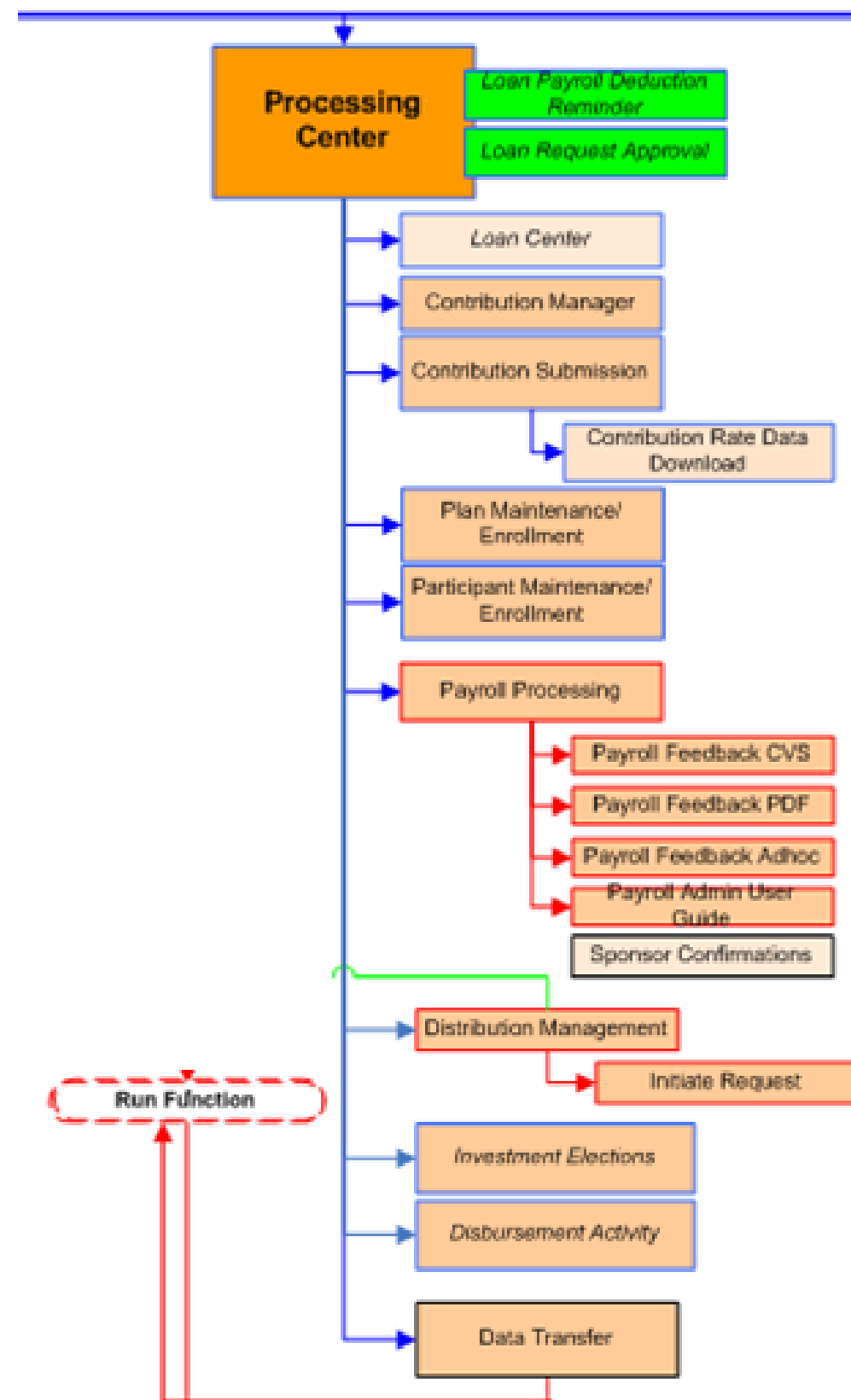
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CQ6405 Processing Center



Processing Center
Loan Center
Contribution Mgr
Contribution Submission
Plan Maintenance/ Enrollment
Participant Maintenance/ Enrollment
Investment Elections
Payroll Processing
Distribution Management
Disbursement Activity
Data Transfer



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Distribution Management

Request Date:

From

To

Participant Name:

string

 SSN:

9 char string

Plan Name:

string

 Plan Number:

string

 Division:

Drop Down

Request Type:

All

 Status:

Open

 Status Type:

Drop down

CLEAR

SEARCH

Initiate New Request >>

Distribution Mgmt Help >>

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25 results per page

for 812 Total Results Next Page > >>

Request Date	Participant Name	Request Type	Amount	Status	Status Type	Plan Name	Plan Number
01/31/12	LYNDA MORRIS Xxx-xx-1234	Withdrawal	\$12,246,599.56	Open	Requested	ABC Company of Greater South Memphis Region	123456-2332
01/31/12	LYNDA MORRIS Xxx-xx-1234	59 ½ Withdrawal	\$599.25	Open	Completed	ABC Company of Greater South Memphis Region	123456-2332
01/31/12	HELEN MCGHEE Xxx-xx-1234	Termination	\$46,878.00	Open	Completed	Gerber Bachnewer Steaidhammand and Paul 401	654321
01/20/12	RONDAL DIBONA Xxx-xx-1234	Termination	\$2,333,599.00	Open	Completed	Gerber Bachnewer Steaidhammand and Paul 401	654321
01/20/12	BRENDA BOLCATA Xxx-xx-1234	Termination	\$46,444.00	Pending	Outstanding	Gerber Bachnewer Steaidhammand and Paul 401	654321
01/20/12	NICOLE WILLIAMS Xxx-xx-1234	Termination	\$5,099.00	Pending	Outstanding	Gerber Bachnewer Steaidhammand and Paul 401	654321
01/20/12	JACQUELINE EDWARDS Xxx-xx-1234	59 ½ Withdrawal	\$88,245.00	Pending	Outstanding	PDX Company of Greater East Memphis Region	454546
12/31/11	NATALIA DXNELACE Xxx-xx-1234	Termination	\$46,959.00	Closed	Termination	PDX Company of Greater East Memphis Region	454546
11/30/11	ARTURO GARCIA Xxx-xx-1234	59 ½ Withdrawal	\$1,233,599.00	Open	Completed	PDX Company of Greater East Memphis Region	454546
10/11/11	ALGERT GREEN Xxx-xx-1234	59 ½ Withdrawal	\$46,599.00	Pending	Completed	PDX Company of Greater East Memphis Region	454546
10/01/11	KAREN BROWN Xxx-xx-1234	Hardship	\$56,599.00	Approved	Sponsor Approval	PDX Company of Greater East Memphis Region	454546
09/13/11	WILLIAMS RODRIGUEZ Xxx-xx-1234	Termination	\$46,599.00	Approved	Termination	Gerber Bachnewer Steaidhammand and Paul 401	654321-5432
09/01/11	SCOTT MARMER Xxx-xx-1234	59 ½ Withdrawal	\$87,599.00	Open	Reviewed	PDX Company of Greater East Memphis Region	454546
08/11/11	CHAUNTE SEVIER-SCOONER Xxx-xx-1234	Hardship	\$46,788.00	Pending	Hardship	PDX Company of Greater East Memphis Region	987678

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for 812 Total Results Next Page > >>

Always appears on screen.

Notes/Annotations

Last Update Range

From

1

1994

To

12

2011

Additional filters are conditional – appearing/disappearing when the user selects “add filter” or “remove filter” Maximum of 3.

Request Date Range

From

1

1994

To

12

2011

Plan Name

Variable
Variable
Variable
Variable

Plan #

Variable
Variable
Variable
Variable

Request Type

View All Requests
Loan Requests
Termination Requests
Withdrawal Requests

Participant Name

string

Status

All
Outstanding
Completed
Pending Approval
Printed
Requested
Reviewed
Suspended

Action Steps

TBD
TBD
TBD
TBD

- 3
- Table headings are sortable.
- 4
- Action Selections appear in a floating popup box. Individual action selections are conditionally available (non greyed out) as applicable.
- 5
- No Pagination – the filter results will all appear/scroll within one screen. However, there needs to be a visual cue indicating the end of the list.

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Contribution Submission

Automated remittance processing makes sure your contributions are processed quickly, accurately and efficiently, every time.

- **IFT** - files in pre-approved formats can be sent to ING using ING's [Internet File Transfer](#) (IFT) application.
- **Payroll Administration** - is an easy-to-use contribution processing tool. This electronic payroll interface automatically reconciles the data you provide with our recordkeeping system, giving you control over payroll contribution processing accuracy [Payroll Administration](#) Top of Form
- **File Delivery** - files in the pre-approved format can be sent securely to ING using our [File Delivery Toolkit](#) (FD) process.

IFT

With the Internet File Transfer (IFT) application, sending your contribution data to ING is easier than ever. IFT gives you the ability to send files, in a pre-approved format, to ING with no additional software or cost. Once your account has been set up, all you need is access to the Internet, and with a few clicks of your mouse, your data will be sent securely to ING for processing. This method is suitable for any size plan.

To learn more about the new features available to you, [click here](#).

Payroll Administration

ING's Payroll Administration tool is an easy-to-use contribution processing tool available through Sponsor Web. This electronic payroll interface automatically reconciles the data you provide with our recordkeeping system, giving you complete control over payroll contribution processing accuracy.

Below are some materials that may help you use the Payroll Administration tool. This material is specifically for Sponsors using the Payroll Administration tool to remit contributions. There are two user guides, a webinar and a flyer. To view these items, click on the names below.

[Payroll Administration User Guide](#)
[Payroll Administration Quick Start Guide](#)
[Payroll Administration Webinar](#)
[Payroll Administration Flyer](#)

File Delivery Toolkit

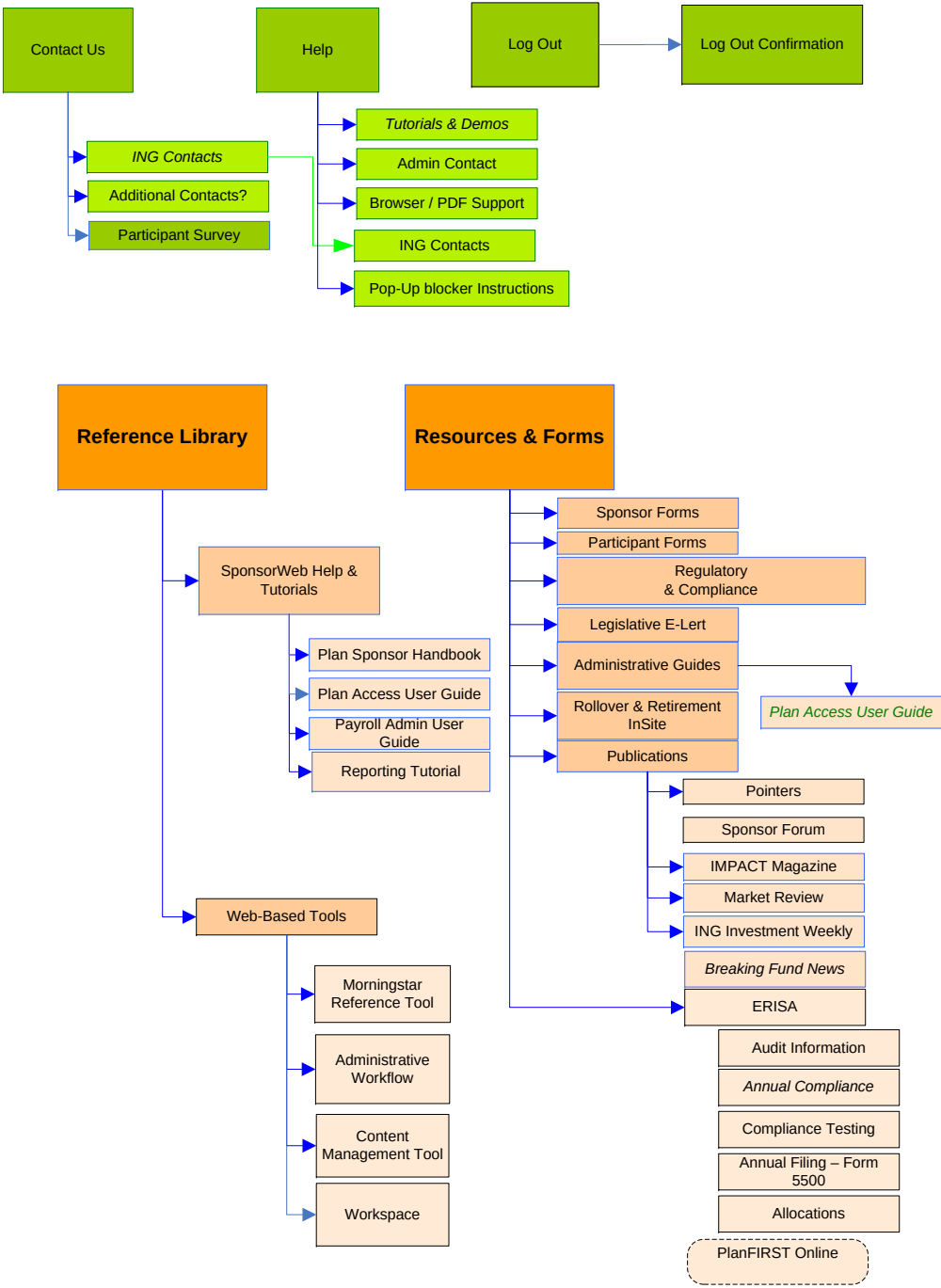
With the File Delivery Toolkit (FD) application, sending your files and data to ING is simple, direct and easy. FD gives you the ability to send files, in a pre-approved format, to ING with no additional software or cost. Once your Sponsor Account has been set up, all you need is access to the Internet, and with a few clicks of your mouse, your files and data will be sent securely to ING for processing. This method is suitable for any size plan.

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CQ6405

Resource Screens



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Help

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Administrative Contacts

- SponsorWeb Webmasters
575-599-5943
- Plan Administrator
575-599-5943

ING Contacts

- SponsorWeb Webmasters
575-599-594
- Plan Administrator
575-599-5943

Browser/PDF Support

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Pop-Up Blocker Instructions

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SponsorWeb Application Tutorials, Guides and Demos

- Report Manual
- Admin User Guide
- Payroll Admin User Guide
- SponsorWeb Workspace Tutorial

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