

TPA Website Wireframes

All Packages

TPA WIREFRAMES v26.vsd

03/07/2012

Sharepoint Location:

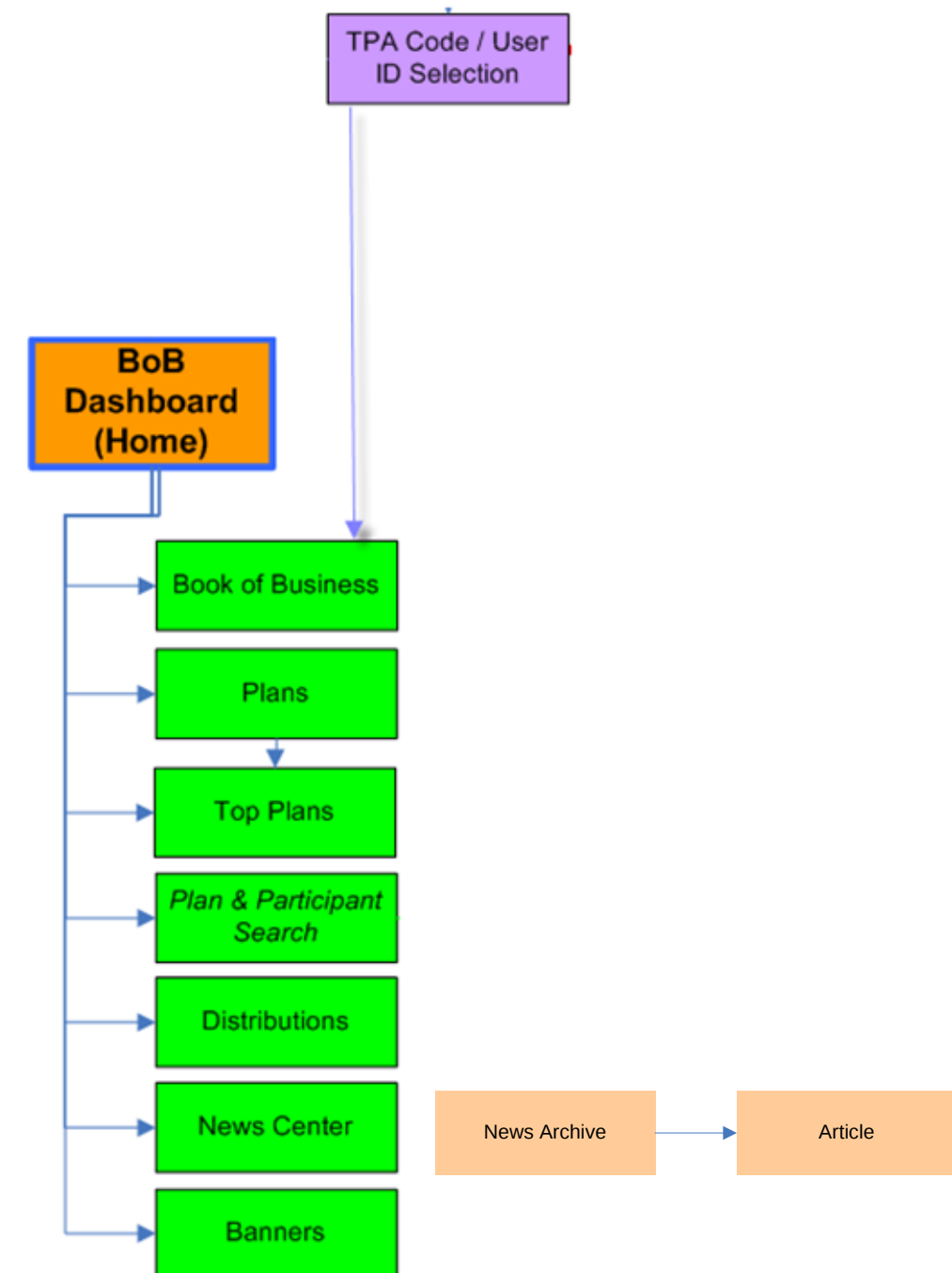
[PR5730 -Improve TPA/Broker Tools, Web and Systems Support](#) > [TPA Website Redesign](#) > [Shared Documents](#) > [IA Design Team](#) > Phase 1 – requirements > [IA Deliverables](#) > [Wireframes](#) > [TPA WIREFRAMES v26.vsd](#)

Items in ORANGE indicate most recently updated wireframes.

1	Cover	37	Distributions [CQ6348]	MAJOR REVISIONS 2011.12.30 - Initial Wireframe Draft 2012.01.19 - Revisions based on team criteria and requirements through 01/19/2012 -jcg 2012.01.24 - Added My Work Items -jcg - Added Edit Top Plans - Final Search Engine format for Plans/Participants 2012.01.27 - Finalized Edit Top Plans screen - Need to add interim page for internal users who need to add their TPA code, name or other information before reaching BoB - Need to add page/solution for users who have been granted access to system but do not yet have plan assignments. 2012.02.17 - Remove Message Center from navigation.
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CQ6346

Book of Business Screens



ING

980 px

THE TPA COMPANY

Home | Profile | [Manage Website Access] | ING Contacts | Site Map | Help | Log Out

Welcome: Pat McGowen Last Login: 03/07/2012 at 09:45 AM EST

Book of Business

Plan Info

Participant Info

Distributions

Reports

Forms

Reference Library

POTENTIAL BANNER

Search available plans by TPA Code or User ID.

TPA Code

Submit

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!
- Over 63,000 students!

Learn More >>

Lorem Ipsum Dolor Set!

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

SAS 70 Report Details to Include Additional Regulatory Data

Loreem ipsum dolor sit. Learn More >>

View All News >>

Notes/Annotations

ING

THE TPA COMPANY

Home | Profile | Manage Website Access | ING Contacts | Site Map | Help | Logout

Welcome: John Smith. Your Last Login: 01/04/2012 at 9:45 AM EST

Book of Business

Plan Info

Participant Info

Reports

Forms

Distributions

Resource Library

TPA Tip #2

Access your Participant Lists Quickly!

Jump directly to your Top Plans' participant listing by clicking on the number under the PPTs column below...

Plan Name

REG COMPANY

TOP OF THE COVER FOR ALLIED HEALTH & LIFE

Plan Number

10000

PPTs

03

Rate

12.11

Search by TPA code or User ID:

TPA Code

Submit

News Center

Exciting News to Enhance ING's Presence with TPAs

02/05/2012

The Corporate and Public markets TPA Channel Management teams have consolidated.

Recent Changes to Withdrawal and Termination Form

01/04/2012

Learn the details of ING's recent updates for plans on the EASE platform.

Notifications for Loans & Distributions

01/04/2012

Starting Thursday August 12, ING will send notifications for loans & distributions to all TPA users.

Recent Changes to Withdrawal and Termination Form

01/05/2012

Learn the details of ING's recent updates for plans on the EASE platform.

View All News >

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TPA Code

TPA Code User ID

600 px

STANDARD "BELOW THE FOLD" LENGTH (600PX)

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MARCH 7, 2012

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TPA WIREFRAMES v26.VSD :: PAGE 4

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THE TPA COMPANY

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Welcome: Pat McGowen Last Login: 03/07/2012 at 09:45 AM EST

To access the TPA Partners Website you must be associated to at least one ING plan.
If you have questions, please contact your TPA Administrator.

Notes/Annotations

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THE TPA COMPANY

In order to access the ING TPA Partners Website you must be associated to at least one plan with ING.
If you have any questions please contact your TPA Administrator.

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STANDARD
"BELOW THE FOLD"
LENGTH (600PX)

ING

980 px

THE TPA COMPANY

Home | Profile | [Manage Website Access] | ING Contacts | Site Map | Help | Log Out

Welcome: **Pat McGowen** Last Login: 03/07/2012 at 09:45 AM EST

Book of Business

Plan Info

Participant Info

Distributions

Reports

Forms

Reference Library

POTENTIAL BANNER

Plans

Information as of 02/21/2012

Plan Name	Plan Number	Total Participants	Total Balance	YTD Contribution
A Insurance Corp	176767	22,999	\$111,999.99	\$36,432.22

Book of Business Summary

Total Active Plans	1
Total Active Participants	22,999
Total Balance	\$ 111,999.99

SEARCH

Plan

Participant

Plan Name:

Or Plan Number:

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

search

POTENTIAL BANNER

Distributions

Open Items for all your plans:

Loan Issue Request

5

Withdrawal Request

1

Termination Request

0

Initiate New Request | View All >>

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 eiusmod. [Learn More >>](#)

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!

Lorem ipsum dolor sit amet, consectetur addipiscing eid. Sed do eiusmod. [Learn More >>](#)

SAS 70 Report Details to Include Additional Regulatory Data

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

View All News >>

View All News >>

Notes/Annotations

ING

THE TPA COMPANY

Home | Profile | Manage Website Access | ING Contacts | Site Map | Help | Logout

Welcome John Smith, Your Last Login: 01/04/2011 at 9:45 AM EST

Book of Business

Plan Info

Participant Info

Reports

Forms

Distributions

Resource Library

TPA Tip #2

Access your Participant Lists Quickly!

Jump directly to your 'Top Plans' participant listing by clicking on the number under the PPTs column below...

Plan Name

ABC Company

123 OF 124 (10/10/11) FOR ALL 22,999 PPTs

Plan Number

176767

Plan

66

PPTs

22,999

TPA Deadline Reminder

Download reports by March 9, 2012

Plans

Print Snapshot

Information as of 01/13/2012

Plan Name	Plan Number	Participants	Balance	YTD Contributions
ABC Company	176767	66	\$2,112,123.00	\$2,234.00

View All Plans | View All Participants >>

Book of Business Summary

Information as of 01/01/2012

Total Plans	1
Total Participants	66
Balance	\$2,112,123.00
Loan Balance	\$0.00
Self-Directed Brokerage Balance	\$0.00
Total Balance	\$2,112,123.00

Search

By Plan

By Participant

Plan Name

OR

Plan Number

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

Search

Distributions

Relationship Summary Open Items:

Loan Requests

5

Withdrawal Requests

1

Termination Requests

2

Initiate New Request | View All >

News Center

Exciting News to Enhance ING's Presence with TPAs

02/02/2012

The Corporate and Public markets TPA Channel Management teams have consolidated.

Recent Changes to Withdrawal and Termination Form

02/14/2012

Learn the details of ING's recent updates for plans on the EASE platform.

Notifications for Loans & Distributions

01/04/2012

Starting Thursday August 12, ING will send notifications for loans & distributions to all TPA users.

Recent Changes to Withdrawal and Termination Form

01/10/2012

Learn the details of ING's recent updates for plans on the EASE platform.

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600 x 400

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MARCH 7, 2012

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TPA WIREFRAMES v26.VSD :: PAGE 6

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THE TPA COMPANY

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Welcome: **Pat McGowen** Last Login: 03/07/2012 at 09:45 AM EST

Book of Business

Plan Info

Participant Info

Distributions

Reports

Forms

Reference Library

POTENTIAL BANNER

POTENTIAL BANNER

Plans

Plan Name	Plan Number	Total Participants	Total 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	\$0.94

123456* Top Plans \$9,111,999.02 >>> \$0.94 View All Participants >>>

Book of Business Summary

Total Active Plans	1
Total Active Participants	22,999
Core Balance (Multiple)	\$111,999.99
Loan Balance (Multiple)	\$ 26,392.29
SDBO Balance (Multiple)	\$ 44,543.00
Life Insurance Balance (Multiple)	\$ 16,000.32
Total Balance (Active Participants)	\$ 111,999.99

SEARCH

Plan

Participant

Plan Name:

Or Plan Number:

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

search

Distributions

Open Items for all your plans:

Loan Issue Request

5

Withdrawal Request

1

Termination Request

0

Initiate New Request | View All >>>

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 eiusmod. Learn More >>>

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!

Lorem ipsum dolor sit amet, consectetur addipiscing eid. Sed do eiusmod. Learn More >>>

SAS 70 Report Details to Include Additional Regulatory Data

Loreem ipsum dolor sit. Learn More >>>

View All News >>>

Book of Business Summary

Total Active Plans238

Total Active Participants14,714

Total Balance (Active Participants)\$ 512,069,521.33

My Top Plans

Information as of 02/21/2012

Plan Name	Plan Number	Total Participants	Total Balance	YTD Contributions
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	\$0.94

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MARCH 7, 2012

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Welcome: **Pat McGowen** Last Login: 03/07/2012 at 09:45 AM EST

Book of Business

Plan Info

Participant Info

Distributions

Reports

Forms

Reference Library

Banner

Plans

Book of Business

SEARCH

Plan

Participant

Last Name:

First Name:

Or

SSN (last 4 digits):

XXX - XX-

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

search

SEARCH

Plan

Participant

Plan Name:

Or Plan Number:

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

search

Banner

Distributions

News Center

Print

600 x 600

230 px

Search Error Messages.

Invalid character. Please enter letters and spaces only.

Invalid character. Please enter numbers only.

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1

Plan Name

A Insurance Corp

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*

Total 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

3

All Plans

Filter Search Results By:

Plan Number

Add Search Criteria

Clear

Apply

2

Sort Top Plans By:

Plan Name

Save

6

Plan Name

Plan Number

Number of Participants

Core Balance

401 HOTEL 401(K) PLAN

A Insurance Corp

ABC Company

A.F.L. PRINTING, INC.

AARON PLUM INC RETIREMENT

ADVOCATE BROKERAGE CORP.

AG SAVINGS & INVESTMENT PLAN

ALLIED BROTHERS INTERMODAL, INC.

HOTEL CHELSEA 401(K) PLAN

HOTEL CHELSEA 401(K) PLUS PLAN

876957

369258

565011

874082

874114

875901

877217

874291

876120

876444

62

4

66

163

456

1

1854

1568

858

22

\$1,721,240.42

\$78,123.12

\$2,112,123.00

\$3,284,495.43

\$123,123.02

\$75,123.02

\$123,000.02

\$5,444.02

\$789,123.54

\$123.54

Save

8

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

Notes/Annotations

ING

THE TPA COMPANY

Home | Profile | Manage Website Access | ING Contacts | Site Map | Help | Logout

Book of Business

Plan Info

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Edit Top Plans

To change your Top Plans list, select up to five plans to appear within your Book of Business dashboard. Plans will appear in alphabetical order.

Current Top Plan List

Plan Name

Plan Number

Number of Participant

Core Balance

A INQUANCE CORP

876957

62

\$1,875,751.89

ABC COMPANY

874082

163

\$3,199,584.85

TRS OF THE CENTER FOR ALLIED HEALTH & NURS

874114

5

\$0.00

TRS OF WILKOFSKY FRIEDMAN KAREL & CUMMINS 401K

875901

35

\$1,759,563.77

TRS OF BENNETT GIULIANO MCDONNELL & PERRONE LLP

877217

257

\$17,752,392.84

All Plans

Filter Search Results By:

Plan Number

Add Search Criteria

Clear

Apply

Sort Top Plans By:

Plan Name

Save

Plan Name

Plan Number

Number of Participant

Core Balance

401 HOTEL 401(K) PLAN

A INQUANCE CORP

ABC COMPANY

A.F.L. PRINTING, INC.

AARON PLUM INC RETIREMENT

ADVOCATE BROKERAGE CORP

AG SAVINGS & INVESTMENT PLAN

ALLIED BROTHERS INTERMODAL, INC

BERNSTEIN LITOWITZ BERGER

HOTEL CHELSEA 401K PLAN

HOUZHAN LAWRENCE, INC

TRS OF THE CENTER FOR ALLIED HEALTH & NURS

TRS OF WILKOFSKY FRIEDMAN KAREL CUMMINS 401K

TRS OF BENNETT GIULIANO MCDONNELL & PERRONE LLP

WORO

YPRESMYSELF.COM

ZEBRA PEN CORPORATION

876957

369258

565011

874082

874114

875901

877217

874291

877080

876120

887074

123456

567845

986521

134576

952147

147952

62

4

66

163

133

77

35

1568

133

77

35

859

56

48

22

8

51

\$1,875,751.89

\$78,123.12

\$2,112,123.00

\$3,199,584.85

\$0.00

\$1,759,563.77

\$17,752,392.84

\$5,444.02

\$5,836,826.16

\$789,123.54

\$78,548,123.54

\$123,321.12

\$456,584,123.12

\$1,456,789.21

\$540,404.33

\$12,265.10

\$3,410,091.53

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 (limit three filters). 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.

STANDARD “BELOW THE FOLD” LENGTH (600 px)

Drop Down

By Plan Name

By Plan Number

By Participant Count

By Core Balance

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DRAFT

MARCH 7, 2012

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TPA WIREFRAMES V26.VSD :: PAGE 9

CQ6346

News Center Screens

ING

980 px

THE TPA COMPANY

Home | Profile | [Manage Website Access] | ING Contacts | Site Map | Help | Log Out

Book of Business

Plan Info

Participant Info

Distributions

Reports

Forms

Reference Library

<< Back to Book of Business

News Center

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 or contact the [TPAWebmaster](#) at 877-463-3122 Option 4.

01-13-2012

Aenean eget felis in erat aliquet luctus nec eget turpis

01-02-2012

Praesent dignissim facilisis mi, vulputate posuere metus blandit at

12-22-2011

Vestibulum eu nisl non mi egestas bibendum sit amet a elit

11-30-2011

Pellentesque luctus purus sed orci ultricies dignissim dignissim quam sollicitudin

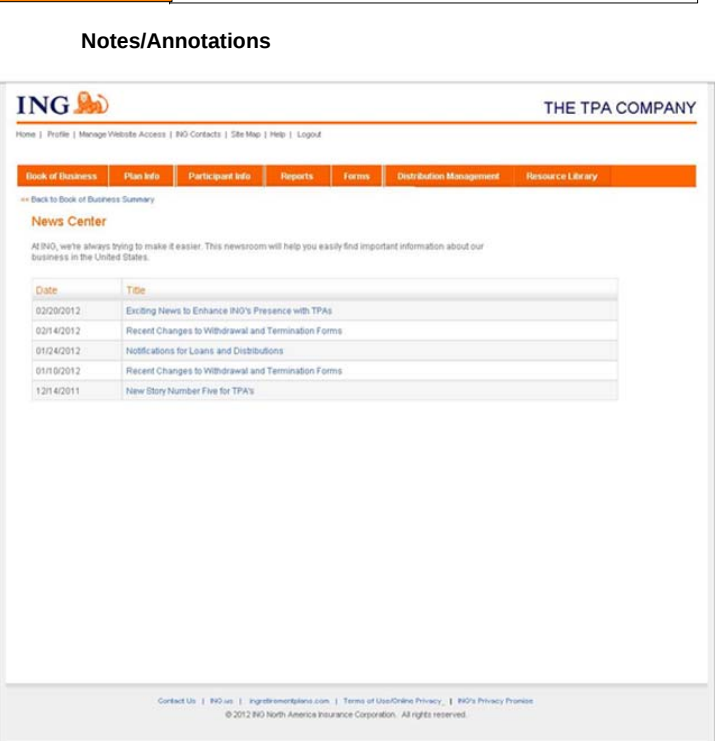
11-30-2011

Sed semper tincidunt erat, ut porttitor metus non

10-02-2009

Etiam lacus metus, sollicitudin sit amet faucibus eu, viverra nec neque. Fusce id imperdiet turpis. Aenean hendredret tellus vitae various gravida

STANDARD
"BELOW THE FOLD"
LENGTH (600PX)



ING

THE TPA COMPANY

Home | Profile | [Manage Website Access] | ING Contacts | Site Map | Help | Log Out

Book of Business

Plan Info

Participant Info

Distributions

Reports

Forms

Reference Library

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 elementum turpis eget lectus consectetur vel feugiat magna dapibus. Integer lacinia mauris et quam ultricies aliquam. Nunc varius elementum congue. Nullam eu cursus magna. Cras pharetra elementum fermentum. Aliquam malesuada, lacus eu dictum consequat, nisi magna accumsan magna, eget posuere nisl purus ut dui. In lacinia pellentesque erat et iaculis. Aenean hendrerit, tellus vitae varius gravida, justo dolor commodo justo, a blandit diam tellus vitae velit. Pellentesque aliquet mattis accumsan. Cras vitae metus vel augue sagittis dictum non sit amet sem.

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Notes/Annotations

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MARCH 7, 2012

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TPA WIREFRAMES V26.VSD :: PAGE 12

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Anchor Page Template

Mauris semper ipsum scelerisque magna mattis facilisis dapibus non ante. Nunc at nisi elit. Curabitur accumsan libero a tellus vulputate in consequat erat condimentum.

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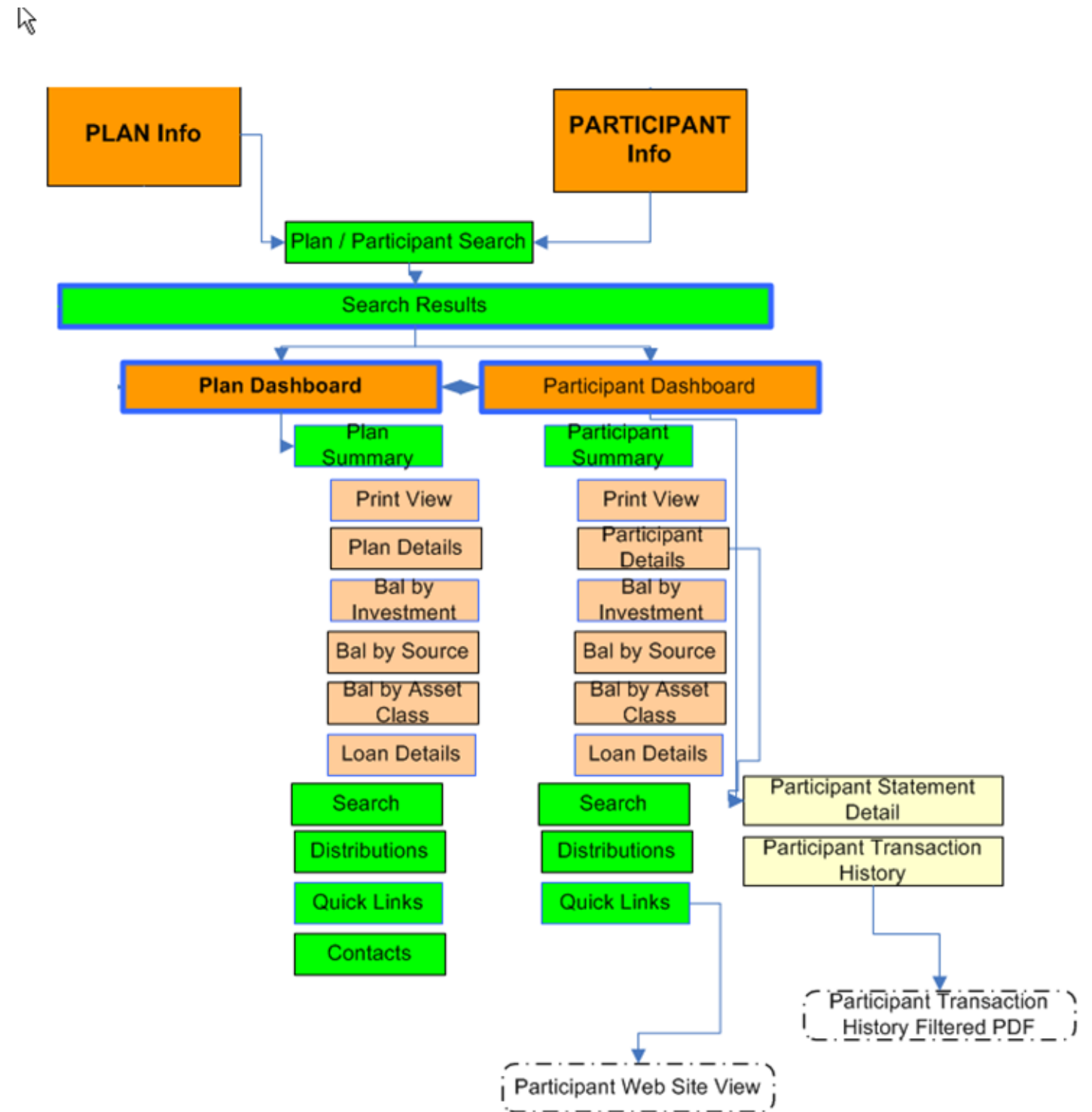
MARCH 7, 2012

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CQ6411

Plan & Participant Screens



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Plan List

As of: 02/21/2012
Number of Plans: 561
Number of Participants: 22,142
Total Balance: \$757,586,340.03

View Inactive Plans >>

Filter Search Results By:

Plan Number

Add Search Criteria

Clear

Apply

<< < Previous Page

Export Data

Screen 1, 2, 3, 4, 5 ... of 16

Items 1-50 of 812 Total Results

Next Page > >>

Plan Number	Plan Name	Plan Manager	Participants	Contract Issue	Total Balance
876957	401 HOTEL 401(K) PLAN	Joe Smith	62	05-05-2011	\$1,675,751.69
874082	A.F.L PRINTING, INC	Joe Smith	163	12-06-2011	\$3,199,584.85
874114	AARON PLUM INC RETIREMENT	Joe Smith	5	12-14-2011	\$0.00
875901	ADVOCATE BROKEAGE CORP	Joe Smith	35	02-19-2011	\$1,759,563.77
877217	AG SAVINGS & INVESTMENT PLAN	Joe Smith	257	10-30-2011	\$17,752,392.84
877080	BERNSTEIN LITOWITZ BERGER	Joe Smith	133	10-02-2011	\$5,836,826.16
888572	BRANT PUBLICATIONS, INC	Joe Smith	2	04-08-2002	\$0.00
887521	BRANT PUBLICATIONS, INC	Joe Smith	77	11-19-2009	\$4,638,412.61
789852	BUTLER ROGERS BASKETT	Joe Smith	63	11-01-2009	\$2,634,994.90
123852	C & C AFFORDABLE	Joe Smith	29	03-15-2010	\$658,582.89
235645	HOTEL CHELSEA 401(K) PLAN	Joe Smith	541	09-12-2003	\$1,123,456.00
854125	HOULIHAN LAWRENCE, INC	Joe Smith	2	12-01-2009	\$21,123.00
785412	TRS OF THE CENTER FOR ALLIES HEALTH & NURS	Joe Smith	74	02-12-2010	\$41,123.00
123456	TRS OF WILKOFSKY FRIEDMAN KAREL & CUMMINS 401(K)	Joe Smith	51	11-21-2011	\$1,123,789.25
145236	TRS OF BENNETT GIULIANO MCDONNELL & PERRONE LLP	Joe Smith	21	10-02-2010	\$12,234.00
195423	WORC	Joe Smith	121	03-30-2099	\$9,124.00
784532	XPRESSMYSELF.COM LLC	Joe Smith	1204	02-25-2010	\$2,154,789.25
887521	XYZ CORPORATION	Joe Smith	1	11-25-2010	\$0.00
789852	ZEBRA PEN CORPORATION	Joe Smith	45	12-06-2003	\$87,542.11
123852	ZINC COMPANY	Joe Smith	101	05-14-2001	\$456,158.00

<< < Previous Page

Screen 1, 2, 3, 4, 5 ... of 16

Items 1-50 of 812 Total Results

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Plan Name

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

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

and

Issue Date between

From

1

1994

To

12

2011

ING

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Plan List

As of: 02/21/2012
Number of Plans: 561
Number of Participants: 22,142
Total Balance: \$775,881,215.03

View Inactive Plans >>

Filter Search Results By: Plan Number

Add Search Criteria

Clear

Apply

<< < Previous Page

Export Data

Screen 1, 2, 3, 4, 5 ... of 16

Items 1-50 of 812 Total Results

Next Page > >>

Plan Number	Plan Name	Plan Manager	Participants	Contract Issue	Total Balance
876957	401 HOTEL 401(K) PLAN	Joe Smith	62	05-05-2011	\$1,675,751.69
874082	A.F.L PRINTING, INC	Joe Smith	163	12-06-2011	\$3,199,584.85
874114	AARON PLUM INC RETIREMENT	Joe Smith	5	12-14-2011	\$0.00
875901	ADVOCATE BROKEAGE CORP	Joe Smith	35	02-19-2011	\$1,759,563.77
877217	AG SAVINGS & INVESTMENT PLAN	Joe Smith	257	10-30-2011	\$17,752,392.84
877080	BERNSTEIN LITOWITZ BERGER	Joe Smith	133	10-02-2011	\$5,836,826.16
888572	BRANT PUBLICATIONS, INC	Joe Smith	2	04-08-2002	\$0.00
887521	BRANT PUBLICATIONS, INC	Joe Smith	77	11-19-2009	\$4,638,412.61
789852	BUTLER ROGERS BASKETT	Joe Smith	63	11-01-2009	\$2,634,994.90
123852	C & C AFFORDABLE	Joe Smith	29	03-15-2010	\$658,582.89
235645	HOTEL CHELSEA 401(K) PLAN	Joe Smith	541	09-12-2003	\$1,123,456.00
854125	HOULIHAN LAWRENCE, INC	Joe Smith	2	12-01-2009	\$21,123.00
785412	TRS OF THE CENTER FOR ALLIES HEALTH & NURS	Joe Smith	74	02-12-2010	\$41,123.00
123456	TRS OF WILKOFSKY FRIEDMAN KAREL & CUMMINS 401(K)	Joe Smith	51	11-21-2011	\$1,123,789.25
145236	TRS OF BENNETT GIULIANO MCDONNELL & PERRONE LLP	Joe Smith	21	10-02-2010	\$12,234.00
195423	WORC	Joe Smith	121	03-30-2099	\$9,124.00
784532	XPRESSMYSELF.COM LLC	Joe Smith	1204	02-25-2010	\$2,154,789.25
887521	XYZ CORPORATION	Joe Smith	1	11-25-2010	\$0.00
789852	ZEBRA PEN CORPORATION	Joe Smith	45	12-06-2003	\$87,542.11
123852	ZINC COMPANY	Joe Smith	101	05-14-2001	\$456,158.00

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Screen 1, 2, 3, 4, 5 ... of 16

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Plan List

You must enter at least 2 characters for Plan Number. Please refine your search.

As of Date: 02/21/2012
Number of Plans: 561
Number of Participants: 22,142
Total Balance: \$775,881,215.03

View Inactive Plans >>

Filter Search Results By: Plan Number

Add Search Criteria

Clear

Apply

561 Results Found

Export Data

View All | 1-20 of 561 >>

Plan Number	Plan Name	Plan Manager	Participants	Contract Issue	Total Balance
876957	401 HOTEL 401(K) PLAN	Joe Smith	62	05-05-2011	\$1,675,751.69
874082	A.F.L PRINTING, INC	Joe Smith	163	12-06-2011	\$3,199,584.85
874114	AARON PLUM INC RETIREMENT	Joe Smith	5	12-14-2011	\$0.00
875901	ADVOCATE BROKEAGE CORP	Joe Smith	35	02-19-2011	\$1,759,563.77
877217	AG SAVINGS & INVESTMENT PLAN	Joe Smith	257	10-30-2011	\$17,752,392.84
877080	BERNSTEIN LITOWITZ BERGER	Joe Smith	133	10-02-2011	\$5,836,826.16
888572	BRANT PUBLICATIONS, INC	Joe Smith	2	04-08-2002	\$0.00
887521	BRANT PUBLICATIONS, INC	Joe Smith	77	11-19-2009	\$4,638,412.61
789852	BUTLER ROGERS BASKETT	Joe Smith	63	11-01-2009	\$2,634,994.90
123852	C & C AFFORDABLE	Joe Smith	29	03-15-2010	\$658,582.89
235645	HOTEL CHELSEA 401(K) PLAN	Joe Smith	541	09-12-2003	\$1,123,456.00
854125	HOULIHAN LAWRENCE, INC	Joe Smith	2	12-01-2009	\$21,123.00
785412	TRS OF THE CENTER FOR ALLIES HEALTH & NURS	Joe Smith	74	02-12-2010	\$41,123.00
123456	TRS OF WILKOFSKY FRIEDMAN KAREL & CUMMING 401(K)	Joe Smith	51	11-21-2011	\$1,123,789.25
145236	TRS OF BENNETT GIULIANO MCDONNELL & PERRONE LLP	Joe Smith	21	10-02-2010	\$12,234.00
195423	WORC	Joe Smith	121	03-30-2099	\$9,124.00
784532	XPRESSMYSELF.COM LLC	Joe Smith	1204	02-25-2010	\$2,154,789.25
887521	XYZ CORPORATION	Joe Smith	1	11-25-2010	\$0.00
789852	ZEBRA PEN CORPORATION	Joe Smith	45	12-06-2003	\$87,542.11
123852	ZINC COMPANY	Joe Smith	101	05-14-2001	\$456,158.00

561 Results Found

View All | 1-20 of 561 >>

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Plan Name

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

Map Plus

Map V

MAP Select

Retirement Plus

Voluntary TDA

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

and

Issue Date between

From

1

1994

To

12

2011

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MARCH 7, 2012

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TRS OF THE CENTER FOR ALLIED HEALTH & NURSING : 342132 | [Change Plan](#)

Print

Plan Summary

Information as of 02/01/2012

Plan Address

P.O.Box 234

Hartford, CT 06159

(USA)

Plan Issue Date

10/22/2010

Total Plan Participants

36,302

Plan Year End Date

12/31/2011

Plan Type:

401(k)

Plan Details >> | View All Participants >>

Balance Information

Balance (Allocated)

\$43,234,333.19

Forfeiture Acct Balance

\$1,000.00

Plan Level Account 1

\$2,000.00

Loan Balance

\$33,493.19

Self-Directed Brokerage Balance

\$23,302.30

TOTAL Balance

\$49,523,478.11

Balance by Source of Money

1

Employee Pretax

\$20,000.00

Employee ABCD

\$10,000.00

Employer Pretax

\$12,000.00

Employer Matching

\$3,000.00

Show Results By:

\$

%

View Balance Details By: [Source >>](#) | [Investment >>](#) | [Asset Class >>](#)

SEARCH

Plan

Participant

Last Name:

First Name:

OR

SSN (last 4 digits):

XXX - XX-

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

search

Quick Links

Reports

> Plan Transaction History

> Access / Activity Report

> Plan Administration Report

> TPA Download

> 5500 Audit Package

> Loan Summary Report

> Plan Disclosure

> Plan Fund Performance

> On-Demand Reporting

Plan Links

> Generate A Form

> Update/View Vesting

> Update Outside Assets

> Upload a file to ING

Distributions

Open Items for all your plans:

Loan Issue Request

5

Withdrawal Request

1

Termination Request

0

Initiate New Request | View All >>

Plan Contacts

(-) ING Plan Manager

Jane Thompson

(800) 123-4576

[janet@abccompany.com](#)

(+) Plan Primary Contact

(+) Plan Trustee

(+) Broker/Adviser

(+) Client Relations Manager

(+) Client Relations Manager

(+) TPA Training & Support Team

Notes/Annotations

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TRS OF BENNETT GIULIANO MCDONNELL & PERRONE LLP | 123456 | Change Plan

Plan Summary

Address

P.O. Box 234

Hartford, CT 06159

USA

Contract Issue

01/15/2012

Total Participants

1,346

Plan Year End

12/31

Plan Type

401(k)

View Plan Details | View All Participants >>

Balance Information

Balance (Allocated)

\$43,234,333.19

Forfeiture Account Balance

\$1,000.00

Plan Level Account 1

\$2,000.00

Loan Balance

\$33,493.19

Self-Directed Brokerage Balance

\$23,302.30

TOTAL Balance

\$43,294,128.68

Balance by Source of Money

1

Employee Pretax

\$20,000.00

Employee ABCD

\$10,000.00

Employer Pretax

\$12,000.00

Employer Matching

\$3,000.00

Show Results By:

\$

%

Search

By Participant

By Plan

Last Name

First Name

OR

SSN (last 4 digits)

xxx - xx -

Partial strings at a minimum of 4 characters will result in a higher number of responses.

search

Quick Links

Reports

> Plan Transaction History

> Access/Activity Report

> Plan Administration Report

> TPA Download

> 5500 Audit Package

> Loan Summary Report

> Plan Disclosure

> Plan Fund Performance

> On Demand Reporting

Plan Links

> Generate a Form

> Update/View Vesting

> Update Outside Assets

> Upload a File to ING

1

Balance by Source of Money

45% - Employee Pretax

20% - Employee ABCD

30% - Employer Pretax

5% - Employer Matching

Show Results By:

\$

%

Plan Contacts

(-) ING Plan Manager

Jane Thompson

(800) 123-4576

[janet@abccompany.com](#)

(+) Plan Primary Contact

Joe Thompson

(800) 123-5678

[Joe@abccompany.com](#)

(+) Plan Trustee

Jack Thompson

(800) 123-9876

[jack@abccompany.com](#)

(+) Broker/Adviser

Jane Thompson

(800) 123-3948

[june@abccompany.com](#)

(+) Client Relations Manager

Jim Thompson

(800) 123-2132

[jim@abccompany.com](#)

(+) Client Relations Manager

Jean Thompson

(800) 123-7654

[jean@abccompany.com](#)

(+) TPA Training & Support Team

Mike Calihan

(800) 123-9753

[mike@abccompany.com](#)

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MARCH 7, 2012

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Plan Summary Snapshot

[Current Date]

TRS OF BENNETT GIULIANO MCDONNELL & PERRONE LLP : 123456

Information as of 01/01/2012

Contract Date: 01/15/2012	Plan Year End: 12/31	Total Participants: 1,346	Plan Type: 401(k)	Product Name: MAP Plus
------------------------------	-------------------------	------------------------------	----------------------	---------------------------

Balance Information

Balance (Allocated)	\$43,234,333.19
Forfeiture Account Balance	\$1,000.00
Plan Level Account 1	\$2,000.00
Loan Balance	\$33,493.19
Self-Direct Brokerage Balance	\$23,302.30
Total Balance	\$43,523,478.11



Balance By Source	
■	Employee Pretax - \$20,000.00
■	Employee ABCD - \$10,000.00
■	Employer Pretax - \$12,000.00
■	Employer Matching - \$3,000.00

Plan Details

Plan Services & Features	
Online Enrollment	Y
Auto Enrollment	Y
Eligibility	Y
Contribution Rate Change	Y
QDIA	ABC Company
ING Sending Notices	Y
Vesting Tracking	ING
Vesting Method	1000 Hours of Service
Vesting Schedule By Source	Profit Sharing Source (F) & Prior Money Source 0-4 years = 0% 5 years = 100%
Morningstar Managed Account	Y

Distribution Options	
Loans Allowed	Y
# of Loans Allowed	5
ING Monitoring for Defaults	Y
Hardships Allowed	Y
591/2	Y
Normal Retirement	Y
Age	Y
Age-Based	Y
Non-Emergency	Y
Partial Termination	Y
TPA Distribution Fees	
Loans	\$100
Withdrawals	\$50
Terminations	\$60

ING

980 px

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Plan Details

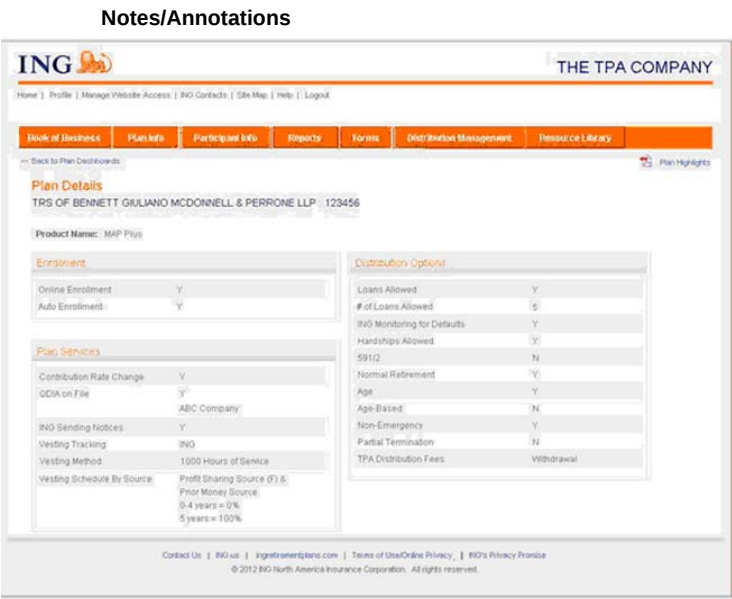
TRS OF THE CENTER FOR ALLIED HEALTH & NURSING : 342132 | [Change Plan](#)

Plan Provisions as of 02/21/2012

Product Name: MAP Plus

Plan Services & Features		Distribution Options	
Online Enrollment	Y	Loans Allowed	Y
Auto Enroll Services	Y	# of Loans Allowed	#
Contribution Rate Change	Y	ING Monitoring for Defaults	Y
QDIA	TRS OF THE CENTER FOR ALLIED HEALTH & NURSING	Hardships Allowed	Y
		59 ½	Y
		Normal Retirement	Y
		Age	Y
		Age Based	Y
		Non-Emergency	N
		Partial Termination	N
		TPA Distribution Fees	
		Loans	\$100
		Withdrawals	\$50
		Terminations	\$60

STANDARD
"BELOW THE FOLD"
LENGTH (600PX)



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980 px

THE TPA COMPANY

600 px

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View Balance Details By: Source >> | Investment >> | Asset Class >>

BALANCE BY SOURCE

TRIS OF THE CENTER FOR ALLIED HEALTH & NURSING : 342132 | [Change Plan](#)

Employee Pretax - \$20,000.00

Employee ABCD - \$10,000.00

Employer Pretax - \$12,000.00

Employer Matching - \$3,000.00

01/31/2012

Month-End Date:

Select...

Year

Select...

DISPLAY >

Money Source	Balance	*YTD Contributions
Employee		
Employee Pretax	\$20,000.00	\$11,000.00
Employee ABCD	\$10,000.00	\$2,000.00
Employer		
Employer Pretax	\$12,000.00	\$4,000.00
Employer Matching	\$3,000.00	\$2,000.00
TOTAL	\$45,000.00	\$19,000.00

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MARCH 7, 2012

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BALANCE BY INVESTMENT

TRs OF THE CENTER FOR ALLIED HEALTH & NURSING : 342132 | [Change Plan](#)

Total Investment Balance: \$23,116,700.23

Total Diversification: 249

Low Risk 19

Moderate 200

Aggressive 30

YTD Contributions: \$2,399,483.20

18.19% - ING Fixed Account
13.87% - American Funds American Balanced Fund A
10.84% - American Funds Washington Mutual Investors F
8.21% - ING PIMCO 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 >

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Fund Name	Fund Number	Asset Class	Balance	YTD Contributions
AIM Charter Fund – Class A	939	Bonds	\$25,300.00	\$25,300.00
Baron Asset Fund	392	Small / Mid / Specialty	\$23,000.00	\$23,000.00
Franklin Small-Mid Cap Growth Fund	123	Bonds	\$34,500.00	\$34,500.00
ING Bond Fund – Class A	322	Small / Mid / Specialty	\$4,000.00	\$4,000.00
Lorem Small Cap	393	Small / Mid / Specialty	\$56.44	\$56.44
Molor Small-Mid Cap Growth	284	Large Cap Value	\$6,000.00	\$6,000.00
Nostrodum Mid Asset	947	Bonds	\$67,797.00	\$67,797.00
Oponesh Mid Asset	374	Small / Mid / Specialty	\$69,045.23	\$69,045.23
Quore Fund	832	Small / Mid / Specialty	\$25,300.00	\$25,300.00
Research Remington Small-Mid Cap Fund	394	Bonds	\$23,000.00	\$23,000.00
Research Remington Small – New Fund	298	Large Cap Value	\$34,500.00	\$34,500.00
Retired Q Fund	100	Aggressive	\$4,322.00	\$4,322.00
Retired T Fund	203	Aggressive	\$256.44	\$256.44
Semple Cap Asset Fund	305	Bonds	\$6,434.00	\$6,434.00
Semple Cap Fund	407	Bonds	\$3,797.00	\$3,797.00
Semple Mid-Cap Fund	508	Bonds	\$69,045.23	\$69,045.23
Templeton Fund Class A	552	Small / Mid / Specialty	\$23,444.00	\$23,444.00
Young Fund B	443	Bonds	\$34,655.00	\$34,655.00

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BALANCE BY INVESTMENT

TRs OF BENNETT GUARDANO MCDONNELL & PERRONE LLP : 123456

18.19% - ING Fixed Accounts
13.87% - American Funds American Balanced Fund A
10.84% - American Funds Washington Mutual Investors
8.21% - ING PIMCO Total Return Portfolio - Initial Class
5.66% - ING Solution 2045 Portfolio
5.31% - ING Solution 2035 Portfolio
37.91% - Other

To view contributions 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 Name	Fund Number	Asset Class	Balance	YTD Contributions
ING Fixed Accounts	123456	Bond	\$50,000.00	\$50,000.00
American Funds American Balanced Fund A	213243	SmallMid CapSpecialty	\$35,000.00	\$35,000.00
American Funds Washington Mutual Investors	987654	Large Cap Value	\$22,000.00	\$22,000.00
ING PIMCO Total Returns Portfolio - Initial Class	135788	Bond	\$17,000.00	\$17,000.00
ING Solution 2045 Portfolio	334332	Large Cap Value	\$3,123.00	\$3,123.00
ING Solution 2035 Portfolio	112345	Large Cap Value	\$2,880.00	\$2,880.00

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Print

Print

14.0% - Money Market

13.87% - Bonds

10.84% - Multi-Class

8.21% - Target Date Funds

5.66% - Stocks

5.31% - Company Stock

31.00% - Other

01/31/2012

Month-End Date:

Select...

Year

Select...

DISPLAY >

Asset Class	Balance	*YTD Contributions
Money Market		
Bonds	\$20,000.00	\$11,000.00
Multi-Class	\$10,000.00	\$2,000.00
Target-Date Funds		
Stocks	\$12,000.00	\$4,000.00
Company Stock	\$3,000.00	\$2,000.00
TOTAL	\$45,000.00	\$19,000.00

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Back to Plan Dashboards

Balance By Source | Balance By Investment | Balance By Asset Class

Balance By Asset Class

TRIS OF BENNETT, GAULIANO MCDONNELL & PERRONE LLP : 129456

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

14.0% - Money Market

13.87% - Bonds

10.84% - Multi-Class

8.21% - Target Date Funds

5.66% - Stocks

5.31% - Company Stock

31.00% - Other

01/31/2012

Month-End Date

Select...

Year

Select...

Display

Asset Class	Balance	YTD Contributions
Money Market	\$50,000.00	\$50,000.00
Bonds	\$20,000.00	\$20,000.00
Multi-Class	\$10,000.00	\$10,000.00
Target Date Funds	\$17,000.00	\$17,000.00
Stocks	\$3,123.00	\$3,123.00
Company Stock	\$2,980.00	\$2,980.00

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Loan Balance

TRS OF THE CENTER FOR ALLIED HEALTH & NURSING : 342132 | [Change Plan](#)

As of Date: 02/02/2012

Total Outstanding Loan Balance: \$33,393.19

Number of Loans: 190

Number of Participants with Loans: 78

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Screen 1, 2, 3, 4, 5 ... of 16

Items 1-50 of 812 Total Results

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Participant Name	SSN	Loan Number	Loan Type	Issue Date	Original Loan Amount	Outstanding Principal Amount	Payment Amount	Interest Rate	Maturity Date	Last Payment Amount	Last Payment Date	Status
WILSON, BARBARA	XXX-XX-12234	1	General	12/13/2011	\$50,000.00	\$40,000.00	\$250.00	4.25%	12/31/2019	\$250.00	02/01/2012	Current
WILSON, BARBARA	XXX-XX-12234	1	General	12/13/2011	\$50,000.00	\$40,000.00	\$250.00	4.25%	12/31/2019	\$250.00	02/01/2012	Current
WILSON, BARBARA	XXX-XX-12234	1	General	12/13/2011	\$50,000.00	\$40,000.00	\$250.00	4.25%	12/31/2019	\$250.00	02/01/2012	Current
WILSON, BARBARA	XXX-XX-12234	1	Residential	12/13/2011	\$50,000.00	\$40,000.00	\$250.00	4.25%	12/31/2019	\$250.00	02/01/2012	Payment Overdue
WILSON, BARBARA	XXX-XX-12234	1	General	12/13/2011	\$50,000.00	\$40,000.00	\$250.00	4.25%	12/31/2019	\$250.00	02/01/2012	Current
WILSON, BARBARA	XXX-XX-12234	1	General	12/13/2011	\$50,000.00	\$40,000.00	\$250.00	4.25%	12/31/2019	\$250.00	02/01/2012	Current
WILSON, BARBARA	XXX-XX-12234	1	General	12/13/2011	\$50,000.00	\$40,000.00	\$250.00	4.25%	12/31/2019	\$250.00	02/01/2012	Current
WILSON, BARBARA	XXX-XX-12234	1	General	12/13/2011	\$50,000.00	\$40,000.00	\$250.00	4.25%	12/31/2019	\$250.00	02/01/2012	Current
WILSON, BARBARA	XXX-XX-12234	1	General	12/13/2011	\$50,000.00	\$40,000.00	\$250.00	4.25%	12/31/2019	\$250.00	02/01/2012	Current
WILSON, BARBARA	XXX-XX-12234	1	General	12/13/2011	\$50,000.00	\$40,000.00	\$250.00	4.25%	12/31/2019	\$250.00	02/01/2012	Current

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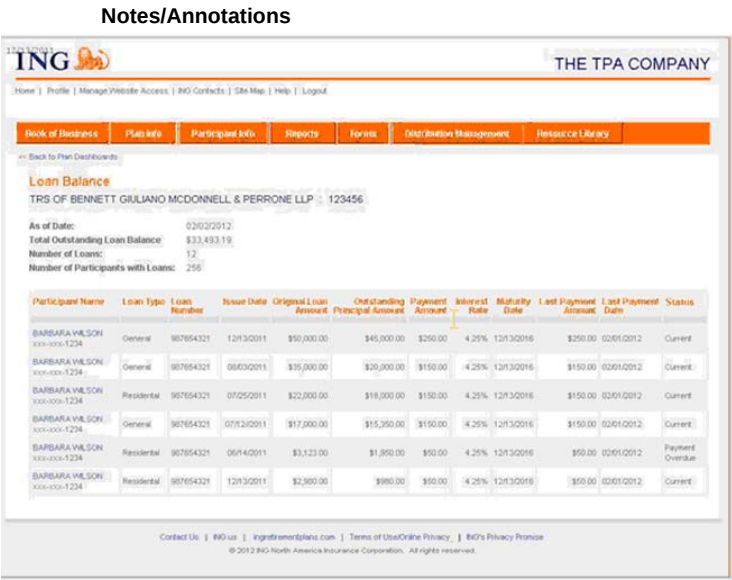
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600px

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As of:02/21/2012

Number of Plans:561

Number of Participants:22,142

Total Balance:\$757,586,340.03

Plan Type: ☒ DC ☐ DB

Filter Search Results By: Issue Date between

From11994To122011

+ Add Search Criteria

Clear

Apply

1

View Inactive Plans >>

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Participant Name	Plan Name	Plan Number	SSN	Age	Total Balance
ARCURE, ANTHONY R.	401 HOTEL 401GQ PLAN	123456	XXX-XX-1234	44	\$250.00
ARCURE, GREGORY L.	A F L PRINTING, INC.	234567	XXX-XX-1234	52	\$250.00
BOPP, JOHN J.	AARON PLUM INC RETIREMENT	345678	XXX-XX-1234	78	\$124.00
BOTT, EVAN M.	ADVOCATE BROKERAGE CORP	456789	XXX-XX-1234	54	\$1,555.00
BRAGEN, THOMAS L.	AG SAVINGS & INVESTMENT PLAN	567890	XXX-XX-1234	45	\$4,225.00
BROWN, LAURA J.	BRYANT PUBLICATIONS, INC.	098765	XXX-XX-1234	45	\$1,999.00
BRYANT PUBLICATIONS, INC.	BRYANT PUBLICATIONS, INC.	098764	XXX-XX-1234	44	\$10,254.00
BUTLER ROGERS BASKETT	BUTLER ROGERS BASKETT	987656	XXX-XX-1234	23	\$24,320.00
C & C AFFORDABLE	C & C AFFORDABLE	876543	XXX-XX-1234	54	\$1,254,215.00
HOTEL CHELSEA 401GQ PLAN	HOTEL CHELSEA 401GQ PLAN	765433	XXX-XX-1234	65	\$2,145,610.00

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Participant List

As of Date:02/01/2012

Number of Plans:561

Number of Participants:22,142

Total Balance:\$775,001,315.03

Filter Search Results By: Total Balance between

1/1/2000and1/1/2010

+ Add Search Criteria

Clear

Apply

561 Results Found

Export Data

View All 1-20 of 561 >>

Participant Name	Plan Name	Plan Number	SSN	Age	Total Balance
ARCURE, ANTHONY R.	401 HOTEL 401GQ PLAN	876957	000-00-7054	61.5	\$0.00
ARCURE, GREGORY R.	A.F.L. PRINTING, INC.	874092	000-00-3412	37.2	\$0.00
BOPP, JOHN J.	AARON PLUM INC RETIREMENT	874114	000-00-4134	69.2	\$1,060.72
BOTT, EVAN M.	ADVOCATE BROKERAGE CORP	875901	000-00-0907	39.7	\$11,627.01
DOVE, WILLIAM	AG SAVINGS & INVESTMENT PLAN	877217	000-00-0543	67.9	\$146,794.43
BRADEN, THOMAS L.	BERNSTEIN LITOWITZ BERGER	877080	000-00-1234	45.0	\$69,221.12
BROWN, LAURA J.	BRANT PUBLICATIONS, INC.	889572	000-00-1457	47.2	\$21,645.94
BRANT PUBLICATIONS, INC.	BRANT PUBLICATIONS, INC.	887521	000-00-2457	77	\$4,638,412.61
BUTLER ROGERS BASKETT	BUTLER ROGERS BASKETT	769952	000-00-4123	63	\$2,634,994.90
C & C AFFORDABLE	C & C AFFORDABLE	123952	000-00-0543	29	\$959,592.89
HOTEL CHELSEA 401GQ PLAN	HOTEL CHELSEA 401GQ PLAN	235645	000-00-4534	541	\$1,123,450.00

561 Results Found

View All 1-20 of 561 >>

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1a

Participant Name

SSN (last four digits)

First and/or Last Name:

1b

Participant Name

SSN (last four digits)

Last four SSN digits

1c

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

1d

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

1e

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

1f

Plan Number

Plan Name

State

Product

Plan Manager

Core Balance between

Non Core Balance between

Total Balance between

Issue Date between

and

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1

Your search for ##### yielded 190 Participant Listings.
Select one of the Participant results below.
Or, refine your search criteria and try again.

As of:02/21/2012
Number of Plans:561
Number of Participants:22,124
Total Balance:\$757,586,340.03

Plan Type: ☒ DC ☐ DB

View Inactive Plans >>

Filter Search Results By:

Issue Date between

From

1

1994

To

12

2011

+ Add Search Criteria

Clear

Apply

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Participant Name	Plan Name	Plan Number	SSN	Age	Total Balance
ARCURE, ANTHONY R.	401 HOTEL 401GQ PLAN	123456	XXX-XX-1234	44	\$250.00
ARCURE, GREGORY L.	A F L PRINTING, INC.	234567	XXX-XX-1234	52	\$250.00
BOPP, JOHN J.	AARON PLUM INC RETIREMENT	345678	XXX-XX-1234	78	\$124.00
BOTT, EVAN M.	ADVOCATE BROKERAGE CORP	456789	XXX-XX-1234	54	\$1,555.00
BRAGEN, THOMAS L.	AG SAVINGS & INVESTMENT PLAN	567890	XXX-XX-1234	45	\$4,225.00
BROWN, LAURA J.	BRYANT PUBLICATIONS, INC.	098765	XXX-XX-1234	45	\$1,999.00
BRYANT PUBLICATIONS, INC.	BRYANT PUBLICATIONS, INC.	098764	XXX-XX-1234	44	\$10,254.00
BUTLER ROGERS BASKETT	BUTLER ROGERS BASKETT	987656	XXX-XX-1234	23	\$24,320.00
C & C AFFORDABLE	C & C AFFORDABLE	876543	XXX-XX-1234	54	\$1,254,215.00
HOTEL CHELSEA 401GQ PLAN	HOTEL CHELSEA 401GQ PLAN	765433	XXX-XX-1234	65	\$2,145,610.00

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TRs OF THE CENTER FOR ALLIED HEALTH & NURSING : 342132 | [Change Plan](#)

Jennifer Carol Jones-Tupperman | [Change Participant](#)

xxx-xx-1234

Participant Summary

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

DOB:
10/22/1965

Hire Date:
06/01/2002

Date of Last Contribution:
01/31/2012

Last Contribution Amount:
\$275.00

Status:
ACTIVE

Participant Details >>

Balance Information

As of 01/31/2012

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

Balance By Source of Money

Employee Pretax\$20,000.00

Employee ABCD\$10,000.00

Emploer Pretax\$12,000.00

Employer Matching\$3,000.00

45% - Employee Pretax

20% - Employee ABCD

30% - Employer Pretax

5% - Employer Matching

Show Results By:

\$

%

View Balance Details By: [Source >>](#) | [Investment >>](#) | [Asset Class >>](#)

SEARCH

Plan

Participant

Plan Name:

Or Plan Number:

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

search

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> Participant Website View

> Request a Loan

> Request a Distribution

> Generate A Form

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Withdrawal Request

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Termination Request

0

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JENNIFER CAROL JONES-TUPPERMAN | Change Participant

Participant Summary

Information As Of 03/20/2012

Address
P.O. Box 224Hartford, CT
06159 USA

DOB
04/06/1965

Status
Active

Date of Last Contribution
01/31/2012

SSN
xxxx-1234

Age
45

Hire Date
06/01/2002

Last contribution Amount
\$275.00

View More Participant Details >>

Balance Information

Balance\$43,234,333.19

Loan Balance\$33,493.19

Self-Direct Brokerage Balance\$23,302.30

Total Balance\$43,523,478.11

Balance By Source of Money

45% - Employee Pretax

20% - Employee ABCD

30% - Employer Pretax

5% - Employer Matching

45% - Employee Pretax

20% - Employee ABCD

30% - Employer Pretax

5% - Employer Matching

View Balance Detail By: [Source](#) | [Investments](#) | [Asset Class >>](#)

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By Participant

By Plan

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First Name

OR

SSN (last 4 digits)

xxx-xx-

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1a

1b

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Participant Summary Snapshot

[Current Date]

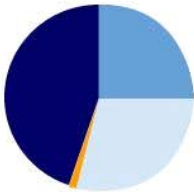
JENNIFER CAROL JONES-TUPPERMAN

Information as of 01/01/2012

Address	SSN	DOB	Age	Status	Hire Date
P.O. Box 234 Hartford, CT 06159 USA	xxx-xx-1234	04/06/1965	45	Active	06/06/2002

Balance Information

Balance	\$43,234,333.19
Loan Balance	\$33,493.19
Self-Direct Brokerage Balance	\$23,302.30
Total Balance	\$43,523,478.11



Balance By Source

- Employee Pretax - \$20,000.00
- Employee ABCD - \$10,000.00
- Employer Pretax - \$12,000.00
- Employer Matching - \$3,000.00

Participant Details

Termination Date	02/02/2014
Location Code and Name	12321 - Location Name ABC
Phone Number	(860) 231-1234
Email	jenniferTupperman@tpa.com
Years of Service	10
YTD Hours Worked	280
Hardship Suspension Date	NA
Beneficiary Information	Spouse
Available Loan Amount	\$50,000.00
Available Withdrawal Amount	\$10,000.00
Auto Enrolled	Y
	QDIA
After-Tax Cost Basis	
Pre 87 after-tax	
Post 86 after-tax	
Roth Cost Basis	
Roth Start Date	
Current Contribution Rate	Source Election
	Source A 20%
	Source B 10%

Future Allocations

Fund Code	Fund	Employee Deferral	Employee Indiv. RollOver	Employer Match	Employer Profit Sharing
108	Fund Name One	50%	50%	50%	50%
109	Fund NameTwo	50%	50%	50%	50%

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Jennifer Carol Jones-Tupperman | [Change Participant](#)

xxx-xx-1234

Participant Details

Termination Date

02/02/2013

Location Code & Name

123211 – Lorem Ipsum
Dlories Contata

Phone Number

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

Auto Enrolled

Y – QDIA

Date of Last Contribution

02/01/2012

Amount of Last Contribution

\$343.00

After Tax Cost Basis:

Pre 87 after-tax

Current Contribution Rate

Source

Election

A20%

B10%

Investment Elections

Fund Code	Fund	Employee Deferral	Employee Indiv. Rollover	Employer Match	Employer Profit Sharing
108	Fund Name One	50%	50%	50%	50%
109	Fund Name Two	50%	50%	50%	50%

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Participant Details

JENNIFER CAROL JONES-TUPPERMAN

Details

Termination Date

02/02/2014

Location Code and Name

12321 - Location Name ABC

Phone Number

(800) 231-1234

Email

jennifer.tupperman@tpa.com

Years of Service

10

YTD Hours Worked

280

Hardship Suspension Date

NA

Beneficiary Information

Spouse

Available Loan Amount

\$50,000.00

Available Withdrawal Amount

\$10,000.00

Auto Enrolled

Y

QDIA

After-Tax Cost Basis:

Pre 87 after-tax

Post 86 after-tax

Roth Cost Basis

Roth Start Date

Current Contribution Rate

Source

Election

Source A20%

Source B10%

Investment Elections

Fund Code	Fund	Employee Deferral	Employee Indiv. Rollover	Employer Match	Employer Profit Sharing
108	Fund Name One	50%	50%	50%	50%
109	Fund Name Two	50%	50%	50%	50%

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1 Any combination of up to all four options for this display item may display.

After-Tax Cost Basis

Pre 87 after-tax

Post 86 after-tax

Roth Cost Basis

Roth Start Date

Investment Elections					
Fund Code	Fund Name	Employee Deferral	Employee Indiv. Rollover	Employer Match	Employer Profit Sharing
108	Fund Name One	50%	50%	50%	50%
109	Fund Name Two Lorem Ipsum Dolor	50%	50%	50%	50%

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MARCH 7, 2012

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ING

980 px

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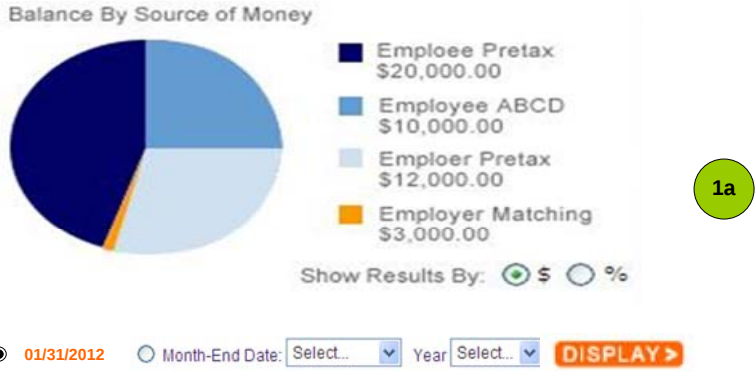
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- Reports
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TRS OF THE CENTER FOR ALLIED HEALTH & NURSING : 342132 | [Change Plan](#) View Balance Details By: Source >> | [Investment](#) >> | [Asset Class](#) >>

Jennifer Carol Jones-Tupperman
XXX-XX-2432  [Print](#)

Balance by Source

As of: 02/22/2012



1a

Money Source	Balance	Vsted Balance	Vested Percentage*	YTD Contributions
EMPLOYEE				
Employee Pretax	\$20,000.00	\$10,000.00	10%	\$2,000.00
Employee Pretax	\$20,000.00	\$20,000.00	10%	\$2,000.00
EMPLOYER				
Employee Pretax	\$20,000.00	\$30,000.00	10%	\$2,000.00
Employee Pretax	\$40,000.00	\$40,000.00	10%	\$2,000.00
TOTAL	\$100,000.00	\$100,000.00		\$8,000.00

*When vesting is tracked using Years of Service, the vesting percentage displayed takes into account prior withdrawals.

Notes/Annotations

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[Back to Participant Summary](#)[View Balance Details By: Source | Investments | Asset Class](#)

Balance By Source

JENNIFER CAROL JONES-TUPPERMAN

Information as of 02/22/2012



- Employee Pretax - \$20,000.00
- Employee ABCD - \$10,000.00
- Employer Pretax - \$12,000.00
- Employer Matching - \$3,000.00

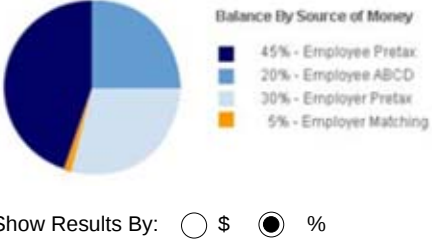
Enter the Date you would like to Display: [Display](#)

Money Source	Balance	Vested Balance	Vested Percentage* As of 02/22/2012	YTD Contributions
EMPLOYEE				
Employee Pretax	\$20,000.00	\$10,000.00	10%	\$2,000.00
Employee ABCD	\$10,000.00	\$2,000.00	20%	\$2,000.00
EMPLOYER				
Employee Pretax	\$12,000.00	\$4,000.00	12%	\$4,000.00
Employer Matching	\$3,000.00	\$1,000.00	10%	\$1,000.00
TOTAL	\$45,000.00	\$17,000.00		\$19,000.00

* When vesting is tracked using Years of Service, the vested percentage displayed takes into account prior withdrawals.

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1b



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TRs OF THE CENTER FOR ALLIED HEALTH & NURSING : 342132 | [Change Plan](#)

Jennifer Carol Jones-Tupperman

XXX-XX-2432

Balance by Investment

As of: 02/22/2012

Total Investment Balance: \$116,700.23

Total Diversification: 22

Low Risk1

Moderate18

Aggressive3

Last Contribution: \$343.20

Date of Last Contribution: 02/02/2012

18.19% - ING Fixed Accounts

13.87% - American Funds American Balanced Fund A

10.84% - American Funds Washington Mutual Investors

9.21% - 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 >

Fund Name	Fund Number	Balance	Unit Price	# of Units
AIM Charter Fund – Class A	939	\$25,300.00	\$25.00	50
Baron Asset Fund	392	\$23,000.00	\$23.00	55
Franklin Small-Mid Cap Growth Fund	123	\$34,500.00	\$34.00	55
ING Bond Fund – Class A	322	\$4,000.00	\$4.00	55
Lorem Small Cap	393	\$56.44	\$56.44	5
Molor Small-Mid Cap Growth	284	\$6,000.00	\$6.00	334
Nostrodrum Mid Asset	947	\$67,797.00	\$67.00	34
Oponesh Mid Asset	374	\$69,045.23	\$6.23	34
Quore Fund	832	\$25,300.00	\$25.00	32
Research Remington Small	290	\$34,500.00	\$34.00	1
Research Remington Small – New Fund	290	\$34,500.00	\$34.00	1
Retired Q Fund	100	\$4,322.00	\$4.00	1
Retired T Fund	203	\$256.44	\$2.44	1
Simple Cap Asset Fund	305	\$6,434.00	\$6.00	1
Simple Cap Fund	407	\$3,797.00	\$3.00	1
Simple Mid- Cap Fund	508	\$69,045.23	\$69.23	1
Templeton Fund Class AA	663	\$25,434.00	\$24.00	1
Templeton Fund Class A	552	\$23,444.00	\$2.00	1
Young Fund B	443	\$34,655.00	\$35.00	1

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View Balance Details By: Source | Investments | Asset Class

Balance By Investment

JENNIFER CAROL JONES-TUPPERMAN

Information as of 02/20/2012

18.19% - ING Fixed Accounts

13.87% - American Funds American Balanced Fund A

10.84% - American Funds Washington Mutual Investors

9.21% - ING FIMCO Total Return Portfolio - Initial Class

5.66% - ING Solution 2045 Portfolio

5.31% - ING Solution 2035 Portfolio

37.91% - Other

Enter the Date you would like to Display:

02/02/2012

Display

Fund Name	Fund Number	Balance	Unit Price	# of Units
ING Fixed Accounts	129456	\$50,000.00	\$20.25	50
American Funds American Balanced Fund A	212043	\$35,000.00	\$32.12	30
American Funds Washington Mutual Investors	987654	\$22,000.00	\$19.25	18
ING FIMCO Total Return Portfolio - Initial Class	135789	\$17,000.00	\$12.02	12
ING Solution 2045 Portfolio	324332	\$3,123.00	\$60.35	8
ING Solution 2035 Portfolio	112345	\$2,000.00	\$32.54	2

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MARCH 7, 2012

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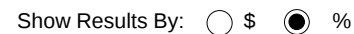
TPA WIREFRAMES V26.VSD :: PAGE 30



View Balance Details By: [Source >>](#) | [Investment >>](#) | [Asset Class >>](#)

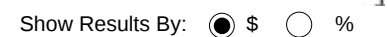
 **Print**

As of: 02/22/2012



1a

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Jennifer Carol Jones-Tupperman

XXX-XX-2432

Participant Loan Balance Details

As of Date:02/20/2012

Total Outstanding Loan Balance:\$33,493.19

Number of Loans:2

Loan Number

Loan Type

Issue Date

Original Loan Amount

Oustanding Principal Amount

Payment Amount

Interest Rate

Maturity Date

Last Payment Amount

Last Payment Date

Status

2

General

12/31/2011

\$50,000.00

\$45,000.00

\$225

4.25%

12/31/2016

\$250.00

02/01/2012

Current

1

General

08/03/2011

\$35,000.00

\$1250.00

\$1250.00

4.25%

12/31/2011

\$250.00

07/01/2011

Payment Overdue

Amortization Schedule:

Loan 1

Loan 2

Loan History

11/01/2011 – 02/01/2012

Transaction Type

Process Date

Effective Date

Transaction Description

Money Source

Transaction Amount

12/28/2011

01/01/2012

Sample Content

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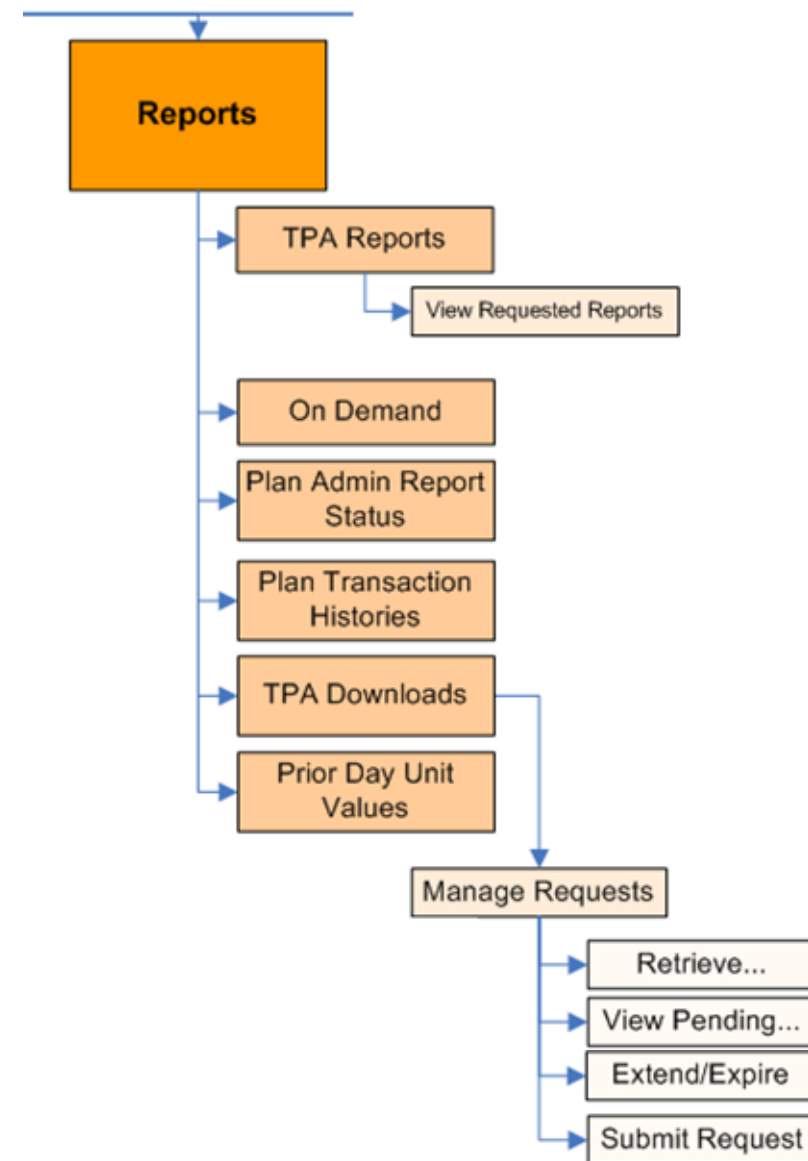
MARCH 7, 2012

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Reports Screens





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Reports

TPA Reports

Lorem Ipsum Dolor set tutu Con Tractsu
Periseliarum Soto Toto Pluquwee

Generate a Report

View Requested Reports

On Demand

Lorem Ipsum Dolor set tutu Con Tractsu
Periseliarum Soto Toto Pluquwee

Plan Admin Report Status

Lorem Ipsum Dolor set tutu Con Tractsu
Periseliarum Soto Toto Pluquwee

Plan Transaction Histories

Lorem Ipsum Dolor set tutu Con Tractsu
Periseliarum Soto Toto Pluquwee

TPA Downloadands

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System Availability

Submit Request

Retrieve Plan Data

Retrieve Plan Year End Data

AUV Downloads

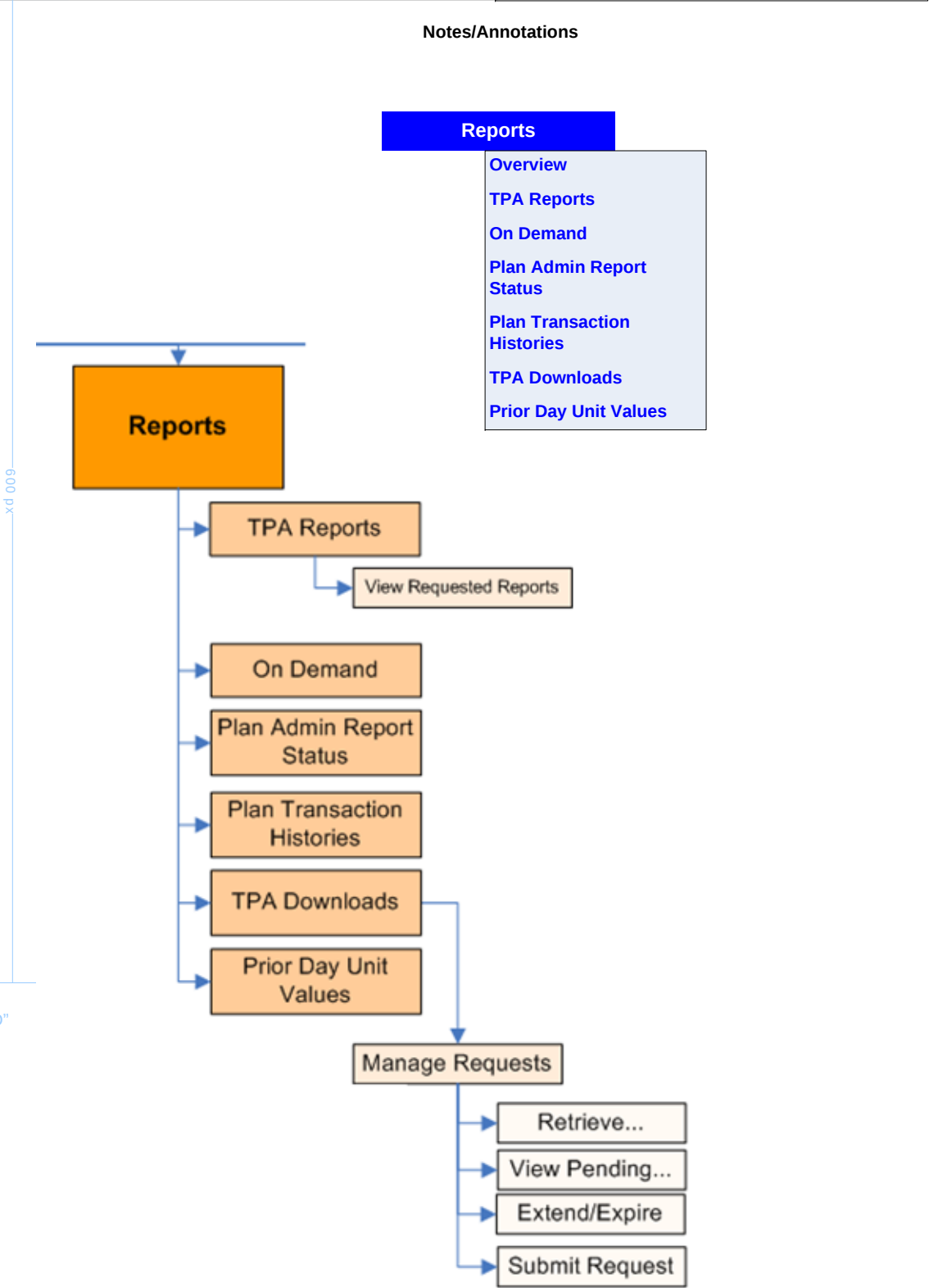
Pending Requests

Extend/Expire Requests

Pending Plan Year End Requests

Prior Day Unit Values

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Periseliarum Soto Toto Pluquwee





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TPA Reports

Select a Report :

- 5500 Packages
- Access/Activity Report
- Auto Enroll Report
- Benchmark Wizard
- Deemed/Default Report (ING Loan Program - Payroll Deduct)
- Deemed/Offset Loans Report
- Delinquent Loans Report
- Distribution Report
- Highest Balance Report (ING Loan Program)
- Investment Usage Report
- Loan Amortization Schedule
- Loan Audit Report (OMNI)
- Loan Summary Report (ING Loan Program)
- Loans Past Maturity Date Report
- Missed First Loan Payment Report
- Participant Address Report
- Participant Statements

Report Description

Select a Plan :

SEARCH >

Report Format :

PDF

- 559142 TRS OF WOODHAVEN LMBR & MILLWORK INC 401K PSP
- 777422 TRS WOODHAVEN LUMBER & MILLWORK INC 401K PSP
- 777879 TRS DS WOLF ASSOC INC 401K EMPLOYEE SAVINGS PL
- 874009 QUONTIC BANK 401(K) PLAN
- 874039 LOCAL 1158 I.B.E.W. PENSION AND UNION PLAN
- 874040 LOCAL 1158 I.B.E.W. WELFARE PLAN
- 874074 CLAIM SERVICES INTERNATNLINC. 401(K) PLAN

On-Demand Reporting is your source for plan activity summaries and historical trend analysis (standard and customizable), for plans utilizing our enhanced TPA Service Model.

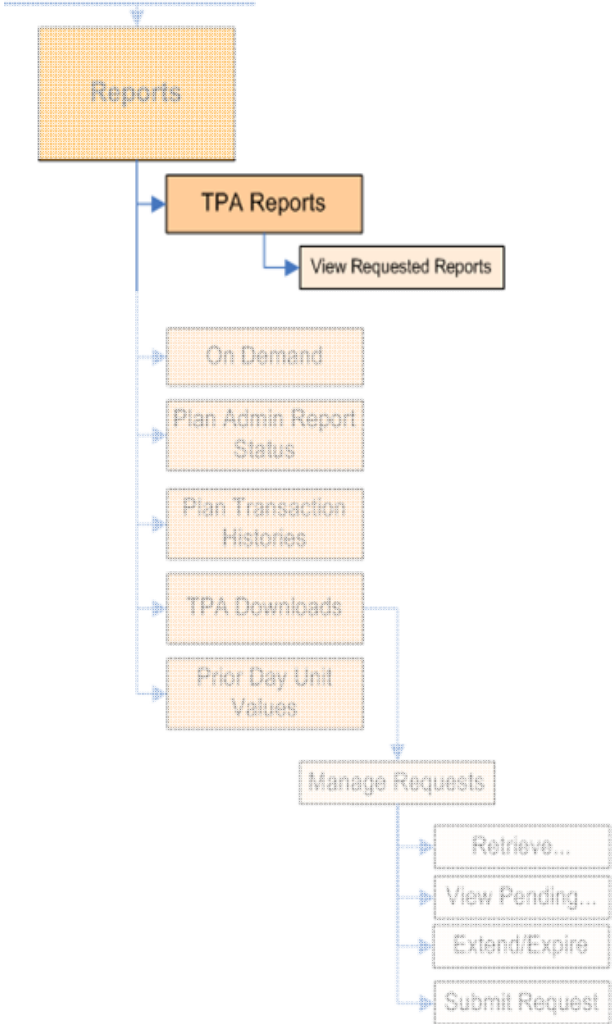
ON-DEMAND REPORTING >

SUBMIT >

- Reports
- Overview
- TPA Reports
- On Demand
- Plan Admin Report Status
- Plan Transaction Histories
- TPA Downloads
- Prior Day Unit Values

Generate Report

View Requested Reports



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Reports > TPA Downloads

System Availability

Files requested for same day download can NOT EXCEED 12 months nor can a current date be used as a report end date.

AUV Downloads

Accumulation Unit Value (AUV) download to obtain variable fund unit values on a daily basis.

Submit Request

Select a date range and one or more plans to submit requests for download data.

Retrieve Plan Data

Retrieve completed download request for specific plans.

Retrieve Plan Year End Data

Retrieve plan year end data for multiple plans.

HELP

Pending Request

View the status of requests.

Extend/Expire Requests

Extend or modify the expiration date of completed requests.

Pending Plan Year End Requests

View the status of automatically produced plan year end requests.

Reports

Overview

TPA Reports

On Demand

Plan Admin Report Status

Plan Transaction Histories

TPA Downloads

Prior Day Unit Values

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Submit Request

Retrieve Plan Data

Retrieve Plan Year End Data

AUV Downloads

Pending Requests

Extend/Expire Requests

Pending Plan Year End Requests

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Reports > TPA Downloads > Pending Plan Year End Requests

Reports

TPA Reports

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Plan Admin Report Status

Plan Transaction Histories

TPA Downloads

Prior Day Unit Values

Manage Requests

Retrieve...

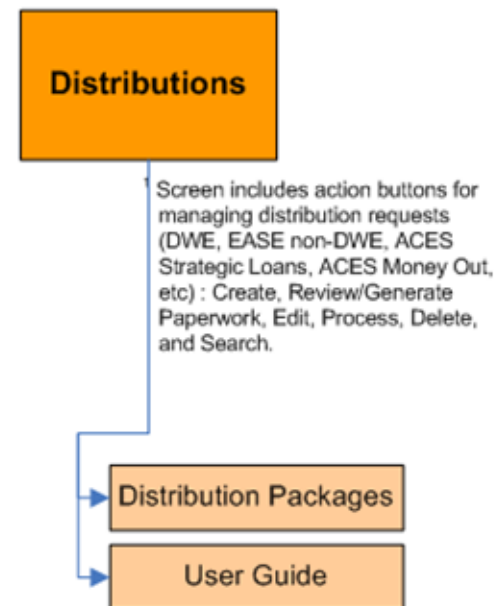
View Pending...

Extend/Expire

Submit Request

CQ6346

Distributions



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Printer Friendly View

Request Date:

Mm/dd/yyyy

Mm/dd/yyyy

Last Name:

string

First:

string

Last Four Digits SSN:

string

Plan Name:

string

Plan Number:

string

Request Type:

All

Status:

Open

Status Type:

All

CLEAR

SEARCH

Initiate New Request >>

Distribution Mgmt Help >>

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Items 1-50 of 812 Total Results

Next Page > >>

Request Date	Participant Name	Plan Name	Plan Number	Request Type	Amount	Status	Status Type
01/31/12	LYNDA MORRIS Xxx-xx-1234	ABC Company of Greater South Memphis Region	123456	Withdrawal	\$12,246,599.56	Open	Requested
01/31/12	LYNDA MORRIS Xxx-xx-1234	ABC Company of Greater South Memphis Region	123456	Withdrawal - 59 ½	\$599.25	Open	Completed
01/31/12	HELEN MCGHEE Xxx-xx-1234	Gerber Bachnewer Steaidhammand and Paul 401	654321	Termination	\$46,878.00	Open	Completed
01/20/12	RONDAL DIBONA Xxx-xx-1234	Gerber Bachnewer Steaidhammand and Paul 401	654321	Termination	\$2,333,599.00	Open	Completed
01/20/12	BRENDA BOLCATA Xxx-xx-1234	Gerber Bachnewer Steaidhammand and Paul 401	654321	Termination	\$46,444.00	Pending	Outstanding
01/20/12	NICOLE WILLIAMS Xxx-xx-1234	Gerber Bachnewer Steaidhammand and Paul 401	654321	Termination	\$5,099.00	Pending	Outstanding
01/20/12	JACQUELINE EDWARDS Xxx-xx-1234	PDX Company of Greater East Memphis Region	454546	Withdrawal – 59	\$88,245.00	Pending	Outstanding
12/31/11	NATALIA DXNELACE Xxx-xx-1234	PDX Company of Greater East Memphis Region	454546	Termination	\$46,959.00	Closed	Termination
11/30/11	ARTURO GARCIA Xxx-xx-1234	PDX Company of Greater East Memphis Region	454546	Withdrawal - 59 ½	\$1,233,599.00	Open	Completed
10/11/11	ALBERT GREEN Xxx-xx-1234	PDX Company of Greater East Memphis Region	454546	Withdrawal - 59 ½	\$46,599.00	Pending	Completed
10/01/11	KAREN BROWN Xxx-xx-1234	PDX Company of Greater East Memphis Region	454546	Withdrawal - Hardship	\$56,599.00	Approved	Sponsor Approval
09/13/11	JULIENNE RODRIGUEZ Xxx-xx-1234	Gerber Bachnewer Steaidhammand and Paul 401	654321	Termination	\$46,599.00	Approved	Termination
09/11/11	SCOTT NIYI AND Xxx-xx-1234	PDX Company of Greater East Memphis Region	454546	Termination	\$46,161.00	Open	Requested
08/11/11	CHAUNTE SEVIER-SCOONER Xxx-xx-1234	PDX Company of Greater East Memphis Region	454546	Withdrawal - Hardship	\$46,788.00	Pending	Hardship

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Items 1-50 of 812 Total Results

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25 results per page

25 results per page
50 results per page
100 results per page
All results on one page

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Withdrawal Request

Account Holder Information

First Name: String

Last Name: String

SSN: String

DOB: String

Age: ##.#

Address: String

City: String

State: Drop down

Zip+four: string

Plan Information

Plan Name:

Product:

IRC:

Billing Group No:

TRS of Test Plan INC 401K PSP

Map V

401(k)

PHH 999

Transaction

Transaction Type: Drop down

AUV Date: ###/###/####

TPA Information

Include TPA Firm information on form

TPA Firm Name:

Address:

City:

State:

Zip Code:

Contact Name:

Phone Number:

Fax Number:

THIRD PARTY ADMINISTRATORS, INC *

1234 MAIN STREET

PO BOX 5678

ANY TOWN

CT

06115-2345

String

String

String

1

Display for Internal Users Only.

2

Display for External Users Only.

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Withdrawal Request

Fees

TPA Fee:

Numeric string

TPA Fee Source:

Drop down

Request by Total Withdrawal Amount OR Source/Fund

Enter the Total Withdrawal Amount or Percentage to pro rate across sources OR enter Source/Fund amount(s) directly into the Distribution Amount fields.

Distribution Method:

\$

%

Total Withdrawal Amount/Percent:

Numeric string

Show Funds

Code	Source/Fund	Current Value	Last Distribution	Distribution Amount	Total Cost Basis Amount
DF	EE DEFERRAL	4,5354.94	06/16/2012	#####	#####
Ht	ER MATCH	818.10	06/16/2012	#####	#####
TOTAL:		5,069.04		2,500.00	

Update

Taxes

Tax Residency Information:

US Citizen / US Resident Alien

Non-Resident Alien

600 px

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Printer Friendly View

Withdrawal Request

Distribution Method

ACH

1

Account Type:

☒ Checking

☐ Savings

ABA Routing No:

999999999

Update

Bank Account No:

Account Holder:

Firstname Lastname

Bank Name:

ING Direct

Phone:

1-888-464-0727

Address 1:

P.O. Box 60

Address 2:

City:

St. Cloud

State:

MN

Zip Code:

56302-0060

Check Stub:

<total Cost Basis amount>

Hardship Distribution

FBO: Fname Lname, SSN:000000000

2

Drop down

ACH

Check

Wire

px

3

STANDARD

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4

Save

Save & Print

Delete Pending Request

Process

Exit

Notes/Annotations

1

ACH is default.
Wire is Internal Audience Access only.

2

Editable by Internal Users Only.

3

Display to External (non ING) Users Only.

4

External Users: Display all buttons.
Internal Users: Display "Save," "Process," and "Exit" only

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Notes/Annotations

Hardship Confirmation

Your transaction has been submitted as of 05/27/2011 3:07 PM EDT.

Requestee Information

SSN-ID: 585844382H170

AUV Date: 05/27/2011

Hardship

PS Value: \$5,069.04

Cash Distribution: 2,500.00

Federal Tax: 10.00% (Calculated)

Dist Amount: \$2,500.00

TPA Fee Source: PS

State Tax: 0.00% (Opt Out)

TPA Fee: \$25.00

Distribution Details

1

Distribution Method: Check

Supress Check: No

Payee: LNAME FNAME – DP (Participant)

Mail to:
address1 address2 streetLine3
CityName, CT 06119-0000 (Participant)

Check Stub:

Total Cost Basis Amount, Hardship Distribution: LNAME FNAME – DP , SSN:999999999

TPA Fee Details

1

TPA Fee Check

Supress Check: No

Payee: BEST TPA (TPA)

Mail to:
5326 ANY STREET DP SUITE
FRANKLIN, TN 37067 (TPA)

Check Stub:
TPA FEE/PLAN# - TRS OF ALL PLAN SALES INC PS TRUST

Display the participant names on confirmation, in the check stub area exactly as it does today.

1

Display only to Internal ING Users.

Print

Exit

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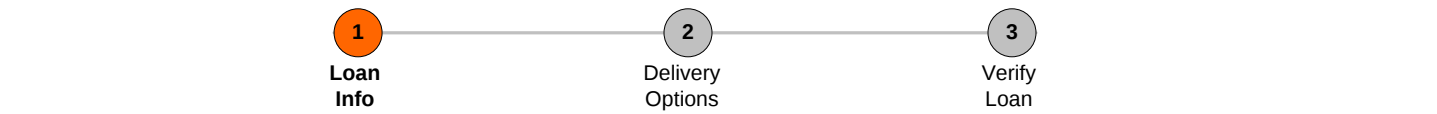
980 px

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Loan Request – Step 1 of 3



Jennifer Carol Jones-Tupperman
XXX-XX-2432

SSN-ID: 585844382H170

Name: JONES-TUPPERMAN, JENNIFER C.

DOB: 05/02/1975

DOH: 08/01/2002

Plan Number: 342132

Plan: TRS OF THE CENTER FOR ALLIED HEALTH & NURSING

Requestee Information

SSN-ID: 585844382H170

Name: JONES-TUPPERMAN, JENNIFER C.

DOB: 05/02/1975

DOH: 08/01/2002

Plan Number: 342132

Plan: TRS OF THE CENTER FOR ALLIED HEALTH & NURSING

Marital Status

Please confirm the participant's Marital Status

- ☐ Married
- ☒ Single

Loan Type

Select Type	Loan Type	Current Rate %	Maximum Loan Amount	Minimum Loan Amount	Available Loan Amount
☒	General	4.7500	\$50,000.00	\$100.00	\$34,638.02
☐	Residential	4.7500	\$50,000.00	\$100.00	\$34,638.02

You may specify either the total amount the participant would like to borrow or the Semi-Monthly amount the participant would like to repay:

Enter the Loan First Repayment Date (mm/dd/yyyy):

☒ Enter a Loan Amount:

Or

☐ Semi-Monthly Payment Amount:

☒ Select the number of repayment months:

12

▼

Or

☐ Select the number of repayment years:

1

▼

Start Over

Next

980 px

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Loan Request – Step 2 of 3



Jennifer Carol Jones-Tupperman
XXX-XX-2432

SSN-ID: 585844382H170	Name: JONES-TUPPERMAN, JENNIFER C.	DOB: 05/02/1975	DOH: 08/01/2002
Plan Number: 342132	Plan: TRS OF THE CENTER FOR ALLIED HEALTH & NURSING		

Delivery Options

☐ Check here to send all payments by expedited delivery

☒ Check

☒ Send this distribution check payable to the participant to the address below.

☐ Check here for Foreign Address

* Address

PO BOX 15588

* City

STAMFORD

* State

CT

* Zip Code

069010588

Country

UNITED STATES

Start Over

Next

980 px

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Loan Request – Step 3 of 3



Jennifer Carol Jones-Tupperman
XXX-XX-2432

SSN-ID: 585844382H170	Name: JONES-TUPPERMAN, JENNIFER C.	DOB: 05/02/1975	DOH: 08/01/2002
Plan Number: 342132	Plan: TRS OF THE CENTER FOR ALLIED HEALTH & NURSING		

Verify Loan

The following is a recap of the loan the participant requested

Martial Status	Single
This Plan requires spousal consent. If the participant is married, paperwork is required for this transaction.	
Loan First Repayment Date:	03/01/2012
Loan Type:	General
Loan Amount:	\$1,000.00
Payment Amount:	\$42.71
Interest Rate:	4.7500%
Loan Repayment Period:	12 months
Loan Payment Frequency:	Semi-Monthly
Distribution Method:	Normal Mail
Mailing address:	
PO BOX 15568 STAMFORD, CT 069010568, US	

☒

Check this box if you would like ING to send the necessary paperwork to the participant when you click the Pend Request button

Please select one of the following:

☐

Send paperwork via regular US mail

☐

Send paperwork via fax to - -

☐

Deposit paperwork in secure Correspondence Inbox.

Start Over

Cancel Request

Pend Request

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Notes/Annotations

Is there any sort of “Verification” screen that shows the loan was successfully appended? Or does the user go back to the Distribution Management Screen?

STANDARD
“BELOW THE FOLD”
LENGTH (600PX)

980 px

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Distribution Packages >>

Printer Friendly View 

Distribution Management

- To add a comment, click Add Comment in the Comments section.
- Items that have been revised since the original Create Date and Time appear in Orange. Click the Orange item or the  icon to view the most recent revision.

Distribution Mgmt Help >>

Task Details

Task Detail

Create Date and Time

02/14/2012 02:14:12

Current Status

OPEN

Action Step

REQUEST PROCESSED

Confirmation Number

3696565T749

Close Date

Task Description

WITHDRAWAL

Task ID

t1201200004

Task Identifier Information

Plan Number

559095

Participant

DIANA ROOS-DP

SSN-ID

956188250

Marital Status

Single

*Transaction Amount

\$5,000.00 

Original Request

Transaction Amount: \$4,000.00

Submitted by: John Han

Submission Date: 01/15/2012 02:12:13

Most Recent Request

Transaction Amount: \$5,000.00

Submitted by: Jack Doe

Submission Date: 01/20/2012 14:34:22

CLOSE 

1

This is a current TPA Site function screen. Only revised functions/designs appear on this wireframe.

2

Items revised after the original Creation Time Date stamp are denoted in Orange along with the update symbol.

3

Clicking the revised item displays a popup window indicating the original data and a historical reference of revisions, submitters, and submission dates/times.

4

Pop up window contains no navigation other than the "close" function.

STANDARD "BELOW THE FOLD" LENGTH (600PX)

*If the requested amount is based upon a percentage, the actual amount distributed may differ due to market fluctuations.

Document List

Created	Doc ID	Total Pages	Name
Nothing found to display.			

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User Guide [Click here](#)

Notes/Annotations

Loan Request

Jennifer Carol Jones-Tupperman

585-84-4382

To add a comment, click Add Comment in the Comments section.

Items that have been revised since the original Create Date and Time appear in Orange. Click the Orange item or the  icon to view the most recent revision.

Participant Summary

Participant Address:

700 Main St

New York, NY 02005

(USA)

DOB:

10/22/1965

Age:

48

Hire Date:

06/01/2002

Status:

ACTIVE

Date of Last Contribution:

01/31/2012

Last Contribution Amount:

\$275.00

Loan Request

Current Status

Action Step

Plan Requires Spousal Consent

Marital Status

Request Date/Time

Request Type

Initiated By

Last Updated

Request ID

Closed Date

Open

Request Processed

Yes

Married

12/12/2011 09:02:26 AM EST

Loan – GP

Participant Web

02/21/2012

345434T

Loan Type:

Loan Available Amount:

TPA Fee

ING Fee

Loan Amount:

Payment Amount:

Loan First Payment Date (mm/dd/yyyy):

Interest Rate (%)

Loan Payment Period:

Loan Payment Frequency:

General

\$2,335.28

\$100.00

NA

\$500.00 

\$21.36

02/04/2012

4.75

12 Month

Semi-Annual

Original Request

Transaction Amount: \$4,000.00

Submitted by: John Han

Submission Date: 01/15/2012 02:12:13

Most Recent Request

Transaction Amount: \$5,000.00

Submitted by: Jack Doe

Submission Date: 01/20/2012 14:34:22

3

Clicking the revised item displays a popup window indicating the original data and a historical reference of revisions, submitters, and submission dates/times.

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MARCH 7, 2012

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Delivery Options

Delivery Method: Check

Address	380 CHAPEL ST
City	STRATFORD
State	CT
Zip / Postal Code	06614 1690
Country	United States

Comments

Added On (Date / Time)	Added By	Subject	Text	Add Comment
Wed Apr 14 11:13:33 EDT 2010	Sponsor	SPONSOR COMMENT	Sample comment	

Documentation

Created On (Date / Time)	Doc ID	Total Pages	Name
Wed Apr 14 11:13:33 EDT 2010	k4d00028.dwf	1	Sample document2.pdf
Wed Apr 14 11:13:33 EDT 2010	k4d00028.dwf	1	Sample document2.pdf
Wed Apr 14 11:13:33 EDT 2010	k4d00028.dwf	1	Sample document2.pdf
Wed Apr 14 11:13:33 EDT 2010	k4d00028.dwf	1	Sample document2.pdf

1

Note: All comments entered will be retained as poart of the permanent administrate files and records.

Comment Subject

TPA COMMENT

Comment Text

Clear

Save

2 Display up to 4 document rows. If more than 4 rows, add scroll bar.

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Need Help ?

User Guide [Click here](#)

Help for this topic [Click here](#)

Notes/Annotations

Loan Request

Jennifer Carol Jones-Tupperman

585-84-4382

To revise this loan request, update the editable fields on screen

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

Loan Request

Plan Requires Spousal Consent

Marital Status

Request Date/Time

Request Type

Initiated By

Last Updated

Request ID

Yes

☒ Married

☐ Single

12/12/2011 09:02:26 AM EST

Loan – GP

Participant Web

02/21/2012

345434T

Loan Type:

Loan Available Amount:

TPA Fee

ING Fee

You may specify either the total amount the participant would like to borrow or the Semi-Monthly amount the participant would like to repay.

Loan Amount:

OR

Payment Amount:

Loan First Payment Date (mm/dd/yyyy):

Interest Rate (%):

Loan Payment Period:

Loan Payment Frequency:

General

\$2,335.28

\$100.00

NA

\$500.00

OR

\$21.36

02/04/2012

4.75

12 Months

Semi-Monthly

Recalculate Loan

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MARCH 7, 2012

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Delivery Options

☒ Send all payments by expedited delivery.

☒ Check

☒ Send this distribution check payable to the participant via address below.

☐ Check here for Foreign Address

* Address

380 CHAPEL ST

* City

STRATFORD

* State

CT

* Zip / Postal Code

06614 1690

* Country

United States

Comments

Added On (Date / Time)	Added By	Subject	Text	Add Comment
Wed Apr 14 11:13:33 EDT 2010	Sponsor	SPONSOR COMMENT	Sample comment	

Documentation

Created On (Date / Time)	Doc ID	Total Pages	Name
Wed Apr 14 11:13:33 EDT 2010	k4d00028.dwf	1	Sample document2.pdf
Wed Apr 14 11:13:33 EDT 2010	k4d00028.dwf	1	Sample document2.pdf
Wed Apr 14 11:13:33 EDT 2010	k4d00028.dwf	1	Sample document2.pdf
Wed Apr 14 11:13:33 EDT 2010	k4d00028.dwf	1	Sample document2.pdf

Cancel Request

Send to Participant

Send to Approver

1

Note: All comments entered will be retained as poart of the permanent administrate files and records.

Comment Subject

TPA COMMENT

Comment Text

Clear

Save

2

Display up to 4 document rows. If more than 4 rows, add scroll bar.

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MARCH 7, 2012

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Withdrawal Request – Step 1 of 3



Recommended:

- 1. Design headings and site wrapper same as “Loans...,” Screens.
- 2. Include “Marital Status” information in Step 1.
- 3. Include “up front” instructions.
- 4. Include a “Verification” screen that shows the withdrawal was successfully appended.

Withdrawal Request – Step 2 of 3



Withdrawal Request – Step 3 of 3





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Withdrawal Request

Jennifer Carol Jones-Tupperman

585-84-4382

Participant Summary

Participant Address:	DOB:	10/22/1965	Date of Last Contribution:	01/31/2012
700 Main St	Age:	47	Last Contribution Amount:	\$275.00
New York, NY 02005	Hire Date:	06/01/2002	Outstanding Loan Balance:	\$2,343.75
(USA)	Status:	ACTIVE		

Withdrawal Request

Current Status	Open
Action Step	Request Processed
Plan Requires Spousal Consent	Yes
Marital Status	Married
Request Date / Time:	12/12/2011 09:02:26 AM EST
Request Type:	Partial Term
Initiated By:	TPA
Last Updated:	12/19/2011
Request ID:	34234324
Termination Date	12/31/2011
Close Date	NA

Request Amount

	Non Roth	Roth
Available Amount :	\$52,558.73	\$23,000.00
Distribution Amount/Percent:	\$2000.00	\$2000.00
Rollover Amount/Percent:	\$2000.00	\$2000.00
Estimated Cash Amount	340.00	230.00
Federal Withholding Amount	\$200.00	\$200.00
State Withholding Amount	\$25.00	\$28.00
[Outstanding Loan Balance]	\$2323.00	\$2348.00
TPA Fee	45.00	45.00
ING Fee	90.00	90.00

ING

980 px

THE TPA COMPANY

600 px

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Money Source Details

Source	Source Name	Market Value	Vested %	Vested Value	Override Vesting %
A	EE Deferrals	565.64	100.0	565.64	NA
9	Employee Rollover	565.64	100.0	565.64	
X	Safe Harbor Match	565.64	100.0	565.64	
D	Employer Match	565.64	0.0	0.0	

Roth Money Source Details

Source	Source Name	Market Value	Vested %	Vested Value
G	Roth Deferral	565.64	100	565.64
G	Roth Rollover	565.64	100	565.64

✔ Non-Roth Rollover

Select Financial Carrier

Fidelity

Account Number:

8569

Account Type:

403 (a) annuity

Address

PO Box 990063

City

Hartford

State

CT

Zip Code

61990063

JIM!
Need to remove editable
screens for Kate.

Remove lines herein.

STANDARD
"BELOW THE FOLD"
LENGTH (600PX)

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Request Type

Request Type: Roth Withdrawal Termination

Available Amount:	\$4,484.70
(Note: The Amount Displayed may be updated based on a vesting override)	

☒ Roth Rollover

☒ Make Elections Same as Non-Roth Rollover Section.

JIM!
Need to remove editable
screens for Kate.

☐ Select Trustee	-- Select Trustee --	☐ Enter Trustee	
Account Number:			
Account Type:	-- Select Account --		
Address			
City			
State	AA		
Zip Code			

Clean up fields
and remove
lines

STANDARD
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LENGTH (600PX)

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Delivery Options

Check

Address

380 CHAPEL ST

City

STRATFORD

State

CT

Zip / Postal Code

06614 1690

Country

United States

JIM!

Need to remove editable screens for Kate.

Match loan version

980 px

600 px

STANDARD "BELOW THE FOLD" LENGTH (600PX)

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Added On (Date / Time)	Added By	Subject	Text	Add Comment
Wed Apr 14 11:13:33 EDT 2010	Sponsor	SPONSOR COMMENT	Sample comment	

Documentation

Created On (Date / Time)	Doc ID	Total Pages	Name
Wed Apr 14 11:13:33 EDT 2010	k4d00028.dwf	1	Sample document2.pdf
Wed Apr 14 11:13:33 EDT 2010	k4d00028.dwf	1	Sample document2.pdf
Wed Apr 14 11:13:33 EDT 2010	k4d00028.dwf	1	Sample document2.pdf
Wed Apr 14 11:13:33 EDT 2010	k4d00028.dwf	1	Sample document2.pdf

Sponsor Approval Required: Online

Notes/Annotations

1

Note: All comments entered will be retained as poart of the permanent administrate files and records.

Comment Subject

TPA COMMENT

Comment Text

Clear

Save

2

Display up to 4 document rows. If more than 4 rows, add scroll bar.

STANDARD
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LENGTH (600PX)

Click 'Send to Approver' to route the rquest to an approver. Any changes made to the distribution request will be saved.

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MARCH 7, 2012

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Withdrawal Request

Jennifer Carol Jones-Tupperman

585-84-4382

To revise this Withdrawal request:

Update the editable fields on screen

Or, select the Edit Request button

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

Outstanding Loan Balance:

\$2,343.75

Withdrawal Request

Plan Requires Spousal Consent

Yes

Marital Status

☒ Married

☐ Single

Request Date / Time:

12/12/2011 09:02:26 AM EST

Request Type:

Partial Term

Initiated By:

TPA

Last Updated:

12/19/2011

Request ID:

34234324

Termination Date (mm/dd/yyyy):

(required)

Request Amount

Available Amount :

The amount displayed may be updated based on a vesting override.

Distribution Amount:

☒ Amount

☐ Percent

☒ Amount

☐ Percent

Rollover Amount:

☒ Amount

☐ Percent

☒ Amount

☐ Percent

Estimated Cash Amount

Not editable

Federal Withholding Amount

Not editable

State Withholding Amount

Not editable

[Outstanding Loan Balance]

Not editable

TPA Fee

ING Fee

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ING

980 px

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600 px

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Money Source Details

Source	Source Name	Market Value	Vested %	Vested Value	Override Vesting %
A	EE Deferrals	565.64	100.0	565.64	
9	Employee Rollover	565.64	100.0	565.64	
X	Safe Harbor Match	565.64	100.0	565.64	
D	Employer Match	565.64	0.0	0.0	Update Vesting

Roth Money Source Details

Source	Source Name	Market Value	Vested %	Vested Value
G	Roth Deferral	565.64	100	565.64
G	Roth Rollover	565.64	100	565.64

Non-Roth Rollover

Select Financial Carrier

Drop down

Enter

Account Number:

8569

Account Type:

403 (a) annuity

Address

PO Box 990063

City

Hartford

State

CT

Zip Code

61990063

Remove lines herein.

STANDARD "BELOW THE FOLD" LENGTH (600PX)

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Comments

Added On (Date / Time)	Added By	Subject	Text	Add Comment
Wed Apr 14 11:13:33 EDT 2010	Sponsor	SPONSOR COMMENT	Sample comment	

1

[Expand for Notes]

Documentation

Created On (Date / Time)	Doc ID	Total Pages	Name
Wed Apr 14 11:13:33 EDT 2010	k4d00028.dwf	1	Sample document2.pdf
Wed Apr 14 11:13:33 EDT 2010	k4d00028.dwf	1	Sample document2.pdf
Wed Apr 14 11:13:33 EDT 2010	k4d00028.dwf	1	Sample document2.pdf
Wed Apr 14 11:13:33 EDT 2010	k4d00028.dwf	1	Sample document2.pdf

Sponsor Approval Required: Online

Edit This Request

- Click 'Reset' to restore the last saved values of this request.
- Click 'Edit Request' to make additional changes that cannot be made on this screen.
- Click 'Save' to commit your changes. From here, you can proceed to Processing below, or exit without processing your request.

Edit Request

Save

Process or Cancel this Request

Participant's election for paperwork delivery if required: Send paperwork via secure Correspondence Inbox

Participant's election to accept updated terms if applicable: Online

☒ Send Paperwork to Participant via:

Drop down

☒ Send to Participant for Online Approval

Enter available email address or blank for editing

Confirm email address

Cancel Request

Send to Participant

Send to Approver

Notes/Annotations

1

Note: All comments entered will be retained as poart of the permanent administrate files and records.

Comment Subject

TPA COMMENT

Comment Text

Clear

Save

2 Display up to 4 document rows. If more than 4 rows, add scroll bar.

STANDARD
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1

US Mail

[Fax]

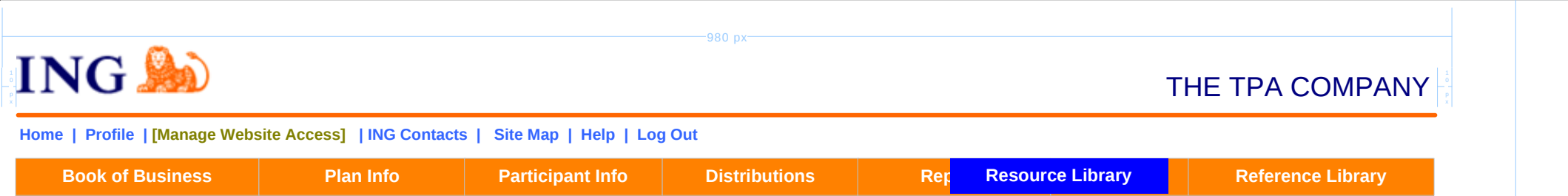
Secure Mailbox

2 Email boxes only appear when box is selected. Second box only appears if user enters text/text revision in first (existing) email address entry.

3

By selecting 'Pend Request' along with your delivery option above, ING will route the correspondence to the participant for request approval.

Click 'Send to Approver' to route the rquest to an approver. Any changes made to the distribution request will be saved.



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- Regulatory/Protoype Document Information
- Demos

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Audit Information

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Technical Support

Lorem Ipsum Dolor set tutu Con Tractsu Periseliarum Soto Toto Pluquwee

- ING TPA Training and Support
- Vendor Technical Support

Industry Links

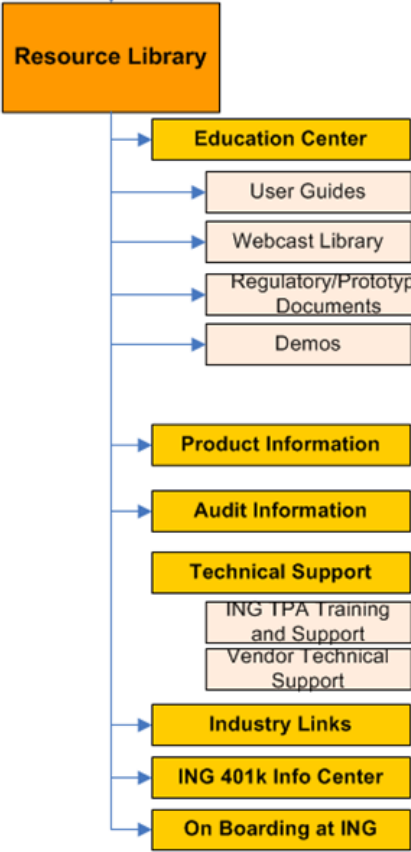
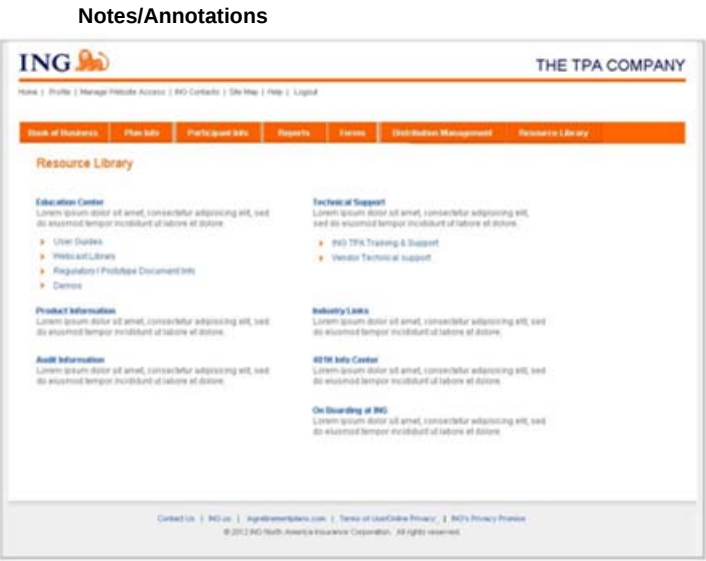
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ING 401K Info Center

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On Boarding at ING

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- Soto Toto Pluquwee
- Periseliarum Soto Toto Pluquwee

Webcast Library

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- Periseliarum Soto Pluquwee
- Soto Toto Pluquwee

Regulatory/Prototype Documents

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- Pluquwee
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Periseliarum Soto Toto Pluquwee Lorem Ipsum
Dolor set tutu Con Tractsu Periseliarum Soto

Title	File Type	File Size
Distributions with EASE User Guide	PDF	928KB
TPA Download User Guide	PDF	166KB
TPA Website - Standard User Guide	PDF	674KB
TPA Website - Website Administers Guide (for those users with the role of website administrator only)	PDF	409KB
On Demand Reporting User Guide	PDF	2MB
Payroll Feedback Information	PDF	91KB
Plan Balance (Prior Day) User Guide	PDF	207KB
TPA Data Management User Guide (formerly Statement Feed)	PDF	323 KB
ING Loan Program - Online Processing Guide	PDF	311 KB
Automated Contribution Methods		
IFT User Guide	PDF	253KB
Loan Default Monitoring Service (for plans that have elected this service - on ING's EASE platform)	PDF	575KB

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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

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Plan Summary	Plan Details	Plan Balance by Source	Plan Balance by Investment	Plan Balance by Asset Class	Plan Loan Details
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> [2010 ACES SAS 70 Final Report](#)

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> [ASC Technical Support](#)

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