T.RowePrice®
INVEST WITH CONFIDENCE

Access your investments and account information with our T. Rowe Price app

With the T. Rowe Price Personal® app, it's easy to stay connected to your investments and account information. Download it for free on your iPhone, iPad, or Android device, and log in using your existing T. Rowe Price user name and password.

T. Rowe Price
401(k) PLANS

Comprehensive service. Committed professionals. Exceptional value.

At T. Rowe Price, we work to exceed expectations at every level. We offer a full suite of retirement plan solutions and deliver investment management and service excellence to help our clients achieve successful participant outcomes.

T. Rowe Price at a Glance

- Leading independent investment management firm since 1937
- Established and respected retirement solutions provider since 1982
- Culture of service excellence that puts clients' interests first
- Deep understanding of participant behavior

Investment Services

Through our time-tested, disciplined approach, we support investors in pursuit of consistent, long-term results. We offer a wide range of high-quality investment options to meet client needs.

- T. Rowe Price proprietary funds (including target date and Institutional Class investments)
- No proprietary fund requirement and over 5,000 non-T. Rowe Price funds on platform
- Publicly traded company securities
- Self-directed brokerage platform
- Supported investment types include separate accounts, commingled trusts, target date funds, custom allocation models, and custom-priced funds

Client Services and Support

We put our clients first in everything we do. Starting with conversion and continuing on through a plan's day-to-day management, a client's core team offers guidance and expertise and takes great care to help ensure that plan sponsor needs are well served.

- Dedicated client contacts
- Annual strategic plan
- A user-friendly digital experience that connects you with the tools and information that you can rely on to keep your plan(s) running smoothly

- Fiduciary educational resources
- Plan investment, cost, and fee reviews
- Ongoing education (client conferences, online networking, and communications)
- Fee guarantees and service-level agreements

Employee Services and Education

Our approach to engaging and educating employees incorporates extensive research and collaboration with experts in the behavioral financial field. Designed to encourage engagement and generate better outcomes, we provide a holistic and practical experience that is integrated across communication channels.

- Dedicated communications consultants
- Annual strategic participant communications plan and calendar
- Conversion, enrollment, and ongoing educational communications
- Online account access and retirement planning tools
- Quarterly participant statements
- Participant Service Center and voice response system
- Employee educational meetings (in person or online)
- Required transactional and compliance communications

Compliance Services

Clients rely on our experienced compliance group to help them with their ongoing duties and keep their plans on track.

- Dedicated compliance support available
- Nondiscrimination testing
- Form 5500 preparation[1]
- Annual audit support
- Volume submitter document (with SPD and SMM)
- Recordkeeping based on individually designed plan documents
- Plan design and testing consultation
- Educational forums to stay updated with industry trends
- Ongoing fiduciary education

Administrative Outsourcing and Recordkeeping

Our technology and in-depth resources are available to our clients, allowing them to outsource burdensome duties so that they can focus their energy at a strategic level.

- Initial plan setup and conversion with ongoing mergers and acquisitions support
- Suite of automated services (e.g., enroll, invest, increase, and rebalance)
- Fully automated participant- and plan-level transactions
- Electronic security (encrypted email, secure Web file transfer, SFTP)
- Plan-specific reports for administrative personnel
- Trustee services
- Nonqualified deferred compensation plan recordkeeping
- Defined benefit plan recordkeeping

Consider the investment objectives, risks, and charges and expenses carefully before investing. For a prospectus or, if available, a summary prospectus containing this and other information, call 1-800-225-5132. Read it carefully.

Let's work together.
Call **1-800-638-7890**.
Or visit **troweprice.com**.

T. Rowe Price Investment Services, Inc., distributor, T. Rowe Price mutual funds.

"The bottom line in Operations is flawless execution."

Dominick Cipolla, Director, Operations
T. Rowe Price Retirement Plan Services, Inc.

[1]Provided through an arrangement with a third-party provider.

T. Rowe Price Retirement Plan Services, Inc.

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