

Participant Education Services

Conrad Siegel Investment Advisors, Inc. provides a straightforward and effective employee education program designed to reduce your fiduciary liability and better prepare your employees for retirement.

Employee Meetings

We can structure a cost-effective employee meeting program that meets your needs both at the conversion of the plan and on an ongoing basis.

Complete Enrollment Packages

New members will receive enrollment kits containing:

- Summary Plan Description
- Enrollment/Election Form
- Beneficiary Designation Form
- Advantages of a 401(k)
- Advantages of Starting Early
- Retirement Needs Worksheet
- Risk Quiz
- Sample Asset Allocations
- Specific fund information, including performance and descriptions

Ongoing Education

In order to help participants develop a better understanding and appreciation for their retirement plan, participants will receive the following on a quarterly basis:

- Account statement
- Investment performance summary
- Informational newsletter on investment and retirement subjects
- A market commentary

On an annual basis, participants will receive a detailed investment performance report designed to help them make informed investment decisions.



Conrad Siegel
INVESTMENT ADVISORS

A Conrad Siegel Actuaries Company

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Conrad Siegel Investment Advisors, Inc. ("CSIA") is an SEC registered investment adviser with its principal place of business in the Commonwealth of Pennsylvania. CSIA and its representatives are in compliance with the current registration requirements imposed upon registered investment advisers by those states in which CSIA maintains clients. CSIA may only transact business in those states in which it is registered, or qualifies for an exemption or exclusion from registration requirements. This brochure is limited to the dissemination of general information pertaining to its investment advisory/management services. Any subsequent, direct communication by CSIA with a prospective client shall be conducted by a representative that is either registered or qualifies for an exemption or exclusion from registration in the state where the prospective client resides. For information pertaining to the registration status of CSIA, please contact CSIA or refer to the Investment Adviser Public Disclosure web site (www.adviserinfo.sec.gov).

For additional information on CSIA, including fees and services, send for our disclosure statement as set forth on Form ADV from CSIA using the contact information herein. Please read the disclosure statement carefully before you invest or send money.

About Conrad Siegel Actuaries

At **Conrad Siegel Actuaries**, we offer high-quality client-focused solutions to businesses seeking stronger performing value-added employee benefits programs. For nearly half a century, **Conrad Siegel Actuaries** has been recognized as both an industry leader and a trusted advisor for its expertise in all facets of employee benefits. We have a strong tradition of providing impartial, numbers-driven advice, customized solutions and unparalleled service.

As one of the nation's largest actuarial firms, we are owned by the professionals who work directly with their clients. We adhere to the highest professional standards, providing services on a fee-only basis. We do not receive commissions or sell investments. Personalized service and long-term relationships are the foundation of all our consulting assignments. As a result, clients trust our advice will always be in their best interests.

We offer a broad array of actuarial consulting and administrative services for defined benefit retirement plans, defined contribution retirement plans, health and welfare consulting, and investment advisory services through our wholly owned subsidiary **Conrad Siegel Investment Advisors, Inc.**

**One Source, One Solution –
Conrad Siegel Actuaries
The Employee Benefits Company**



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