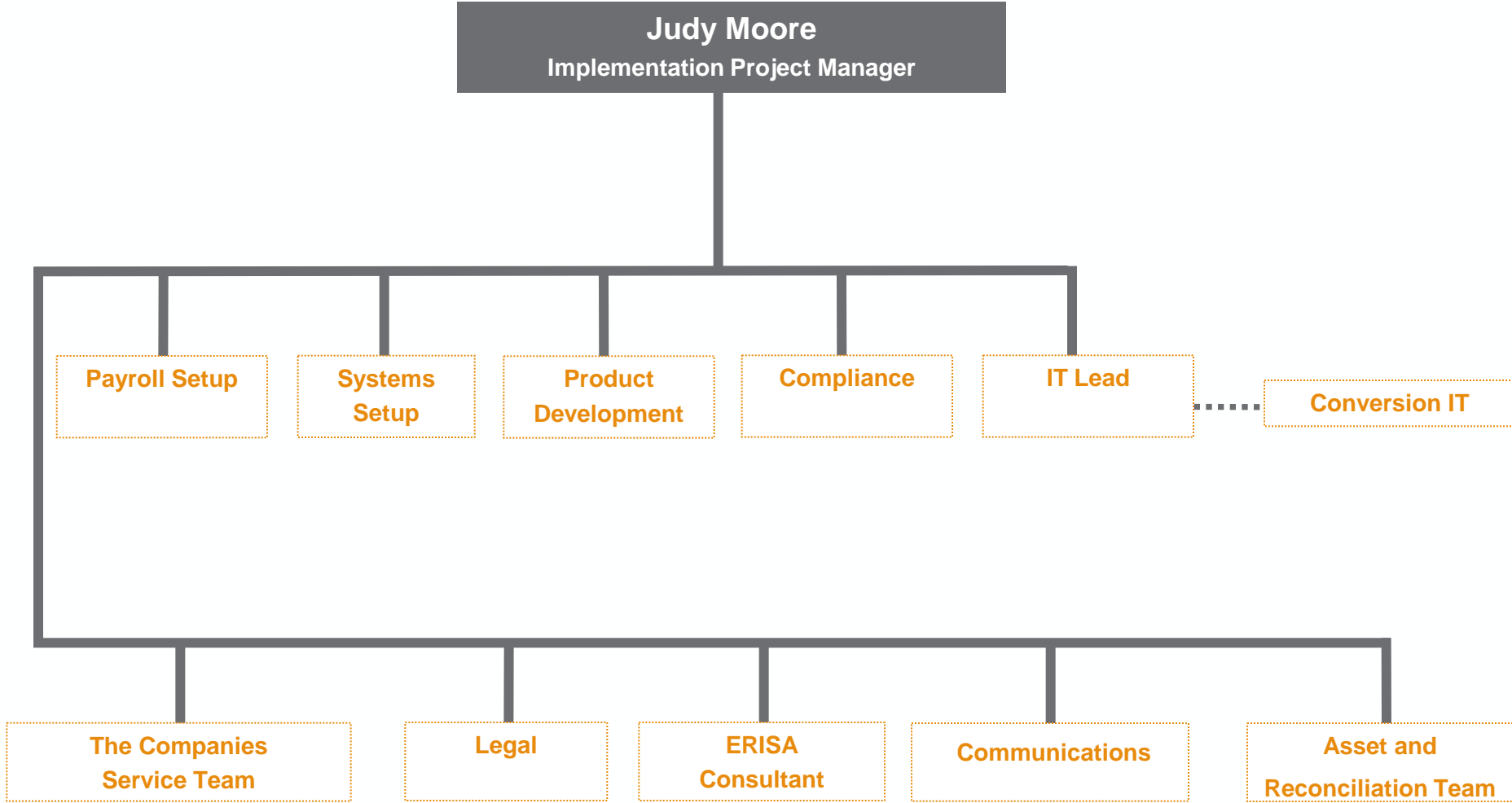


Examples of Judy's conversion experience

Client	American Electric Power	Global 500 Insurance Company	Fortune 100 Technology Solutions Company
Industry	Utility	Insurer	Technology solutions
Number of participants	26,133	4,318	41,000
Plan assets	\$3B	\$340M	\$2.9B
Prior Recordkeeper	Fidelity	Hewitt	Fidelity
Conversion complexities	<ul style="list-style-type: none"> • One qualified and two nonqualified plans • Re-enrollment • Installed managed accounts • Converted from a mutual fund lineup to a separate account/commingled fund lineup • Installed custom target date solution • Fourth of July weekend conversion 	<ul style="list-style-type: none"> • Qualified and nonqualified plan • Company stock using ADRs • Added brokerage • Added Roth • After tax chaining provision when hitting pretax limit • 24-month hold back on withdrawals involving match and profit sharing 	<ul style="list-style-type: none"> • Brokerage • Handled a major merger along with main conversion • Managed accounts • Special reports created • Single sign-on from plan sponsor intranet • Vanity URL • Utilized plan sponsor's technology

Conversion Project Team



Conversion Timeline

