



RETIREMENT SERVICES CALCULATOR

This is a Title TBD

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Calculating Your Savings



Information and interactive calculators are made available to you as self-help tools for your independent use and are not intended to provide investment advice. We cannot and do not guarantee their applicability or accuracy with regard to your individual circumstances. All examples are hypothetical and are for illustrative purposes. We encourage you to seek personalized advice from qualified professionals regarding all personal finance issues.

Please Note: The information presented by the calculators is for illustration purposes only, and the results shown are dependent upon the assumptions and information entered by you. These calculators cannot predict investment returns or other future results.

Have questions? Contact us at **1.800.258.7878**

Give us a call or send us a message. We'll help you out with any of your custody needs.

[Submit an inquiry](#)

Client service hours: Mon – Fri, 8:00am – 4:30pm C.T.



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Calculating Your Savings

1 TO START, PICK YOUR PLAN TYPE

- ☐ Defined Contribution Plan
- ☐ Defined Benefit Plan

2 CALCULATE TOTAL INACTIVE PARTICIPANTS



3 CALCULATE COST PER PARTICIPANT



4 CALCULATE TOTAL POTENTIAL SAVINGS



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Calculating Your Savings

1 **TO START,
PICK YOUR PLAN TYPE**

☐ Defined Contribution Plan
☐ Defined Benefit Plan

2 **CALCULATE TOTAL
INACTIVE PARTICIPANTS**
Total Participants in Plan:

Total Active Participants
in Plan:

3 **CALCULATE COST
PER PARTICIPANT**

4 **CALCULATE TOTAL
POTENTIAL SAVINGS**

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Calculating Your Savings

1 **TO START,
PICK YOUR PLAN TYPE**

☐ Defined Contribution Plan
☐ Defined Benefit Plan

2 **CALCULATE TOTAL
INACTIVE PARTICIPANTS**
Total Participants in Plan: ⓘ

Total Active Participants
in Plan:

3 **CALCULATE COST
PER PARTICIPANT**

Average Administrative
Costs Per Year: ⓘ
\$

4 **CALCULATE TOTAL
POTENTIAL SAVINGS**

+

×

-

=

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Calculating Your Savings

1 **TO START,
PICK YOUR PLAN TYPE**

☐ Defined Contribution Plan
☐ Defined Benefit Plan

2 **CALCULATE TOTAL
INACTIVE PARTICIPANTS**
Total Participants in Plan: ⓘ

Total Active Participants
in Plan:

3 **CALCULATE COST
PER PARTICIPANT**

Average Administrative
Costs Per Year: ⓘ
\$

4 **CALCULATE TOTAL
POTENTIAL SAVINGS**

+

×

−

=

[GO >](#)

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Total Potential Savings Per Year

\$1,000,000,000,000

Want to Learn More Ways to Save?

Click below to receive an email with these results, additional potential savings calculations, and more information on our automatic rollovers.

[Learn More](#)

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Total Potential Savings

\$1,

Want to Learn More Ways to Save?

Complete the information to receive an email with these results, more information on automatic rollovers, and additional potential savings calculations.



First Name *

Last Name *

Email *

Phone

Company

Industry *



Submit

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