The John Hancock Plan Review
A comprehensive look at how your plan is doing

The Plan Review provides you with a wide variety of plan health and retirement readiness metrics to help you quickly review and compare relevant benchmarks. It also helps you zero in on areas of your plan that are working well, or that may need improving.

The Plan Review is organized into easy-to-understand sections so you can quickly see:

A snapshot of the current state of your plan including key statistics compared to industry specific benchmarks

Plan health data including participation, deferral, enrollment and goal setting details, so you can focus education and awareness campaigns

FIDUCIARY TIP
As part of your ongoing fiduciary responsibilities, it’s important to periodically monitor your plan. The Plan Review can assist you with this and is a great way to help ensure you achieve the goals you’ve established for your plan.

For more information about this reduction, please refer to your signed offer letter

† EBRI study; 401(k) Plan Asset Allocation, Account Balances and Loan Activity – Issue Brief December 2014; Plans with GICs and/or SV Funds

**Average is based on participants' Rate of Return for the past 12 months and calculated as of the last available quarter.

*Data is calculated annually for March 31 statements and is based on the assumptions as set out on the goal setting tool.

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This proactive review resulted in the following reduction of your per participant fee reduced by $XX.XX/month ($XX.XX/month)

In addition to the Dynamic Plan Review, we further reduced your plan by

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11 XX.X%

10 XX.X%

10,000

20,000

25,000

35,000

40,000

45,000

Active participants: average balances by age

2013

Median $XX,XXX.XX XX.X%

Mean $XX,XXX.XX XX.X%

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20,000

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40,000

45,000

Active participants: average balances

Mean Median

Year Your plan

Median $XX,XXX.XX $XX,XXX.XX

Mean $XX,XXX.XX $XX,XXX.XX

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Using historical data, you can identify trends on assets, contributions and other transactions, to spot areas where efficiencies can be made.

View services that are available but not selected to make sure you’re taking advantage of all the tools available to your plan.

Review a summary of your retirement plan costs and details of how these costs are collected.

See investment breakdowns by age to spot potential diversification or risk tolerance issues so you can focus education efforts.

And more…

To learn more about the benefits of the Plan Review and how you can use it to monitor your plan, contact your local John Hancock Representative.