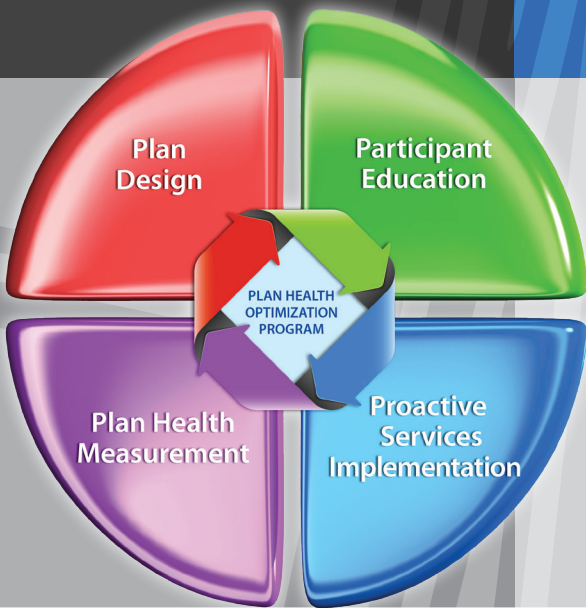


CASE STUDY – COMPOSITE



Plan Health Solutions drives and delivers real results.

Plan Health Solutions offers high quality service through personalized plan **design**, quality participant **education**, proactive service **implementation**, and accurate **measurement**.

The numbers below demonstrate improvements to the health of retirement plans when proactive steps are taken.

Average Participation Rate

+25.65%

Average Deferral Rate

+36.50%

Average Number of Holdings

+247.65%

The effects of a well-executed Plan Health Solutions Strategy.*

*By tracking specific data as a result of the Plan Health Optimization Program, one can measure change in participation, deferrals and diversification.

Since January of 2012, QPA has been tracking all transitions and the combined changes, which are represented in the data provided. Representation will include the overall percentage increases after the transition to Plan Health Solutions.

More specific figures are provided in the following documents.



A service offered by 

Please visit www.planhealth.com for more information

CASE STUDY – COMPOSITE



Participation Rate

Plans Prior to Plan Health Solutions Engagement

66.29%

Plans After Completion of Risk Assessment Only

+19.33%

Plans Engaged In Plan Health Optimization Program

+45.63%

Average Deferral Rate

Plans Prior to Plan Health Solutions Engagement

4.92%

Plans After Completion of Risk Assessment Only

+31.64%

Plans Engaged In Plan Health Optimization Program

+45.51%

Average Number of Holdings

Plans Prior to Plan Health Solutions Engagement

3.55

Plans After Completion of Risk Assessment Only

10.48

Plans Engaged In Plan Health Optimization Program

9.94

More detailed plan information will be provided upon request

Please note QPA began tracking plan health data on January 1, 2012. All data provided by the plan sponsors and administrators. Composite average do not include plans with incomplete data. QPA provides services to other plans that were transitioned before the January 1, 2012. Past Performance is no guarantee of future results. Your experience may vary. This illustration does not pertain to performance of any investment.

Securities offered through Cambridge Investment Research, Inc., a Broker/Dealer, Member FINRA/SIPC. Investment Advisor Representative, Lawing Financial, Inc., A Registered Investment Advisor. Lawing Financial, Inc., doing business as Qualified Plan Advisors (QPA).

6201 College Blvd, 7th Floor
Overland Park, KS 66211
Phone: 913-491-6226
Fax: 913-491-3214
www.qualifiedplanadvisors.com

Cambridge and Lawing Financial, Inc. are not affiliated



Please visit www.planhealth.com for more information