T. Rowe Price

403(b) PLANS

Dedicated specialists. Flexible solutions. Exceptional value.

As part of our total retirement offering, T. Rowe Price offers flexible, quality services to meet the needs of clients with 403(b) plans. T. Rowe Price acts as a full-service recordkeeper, including 457 and 401(a) plans.

T. Rowe Price at a Glance

- Leading independent investment management firm since 1937
- Established and respected retirement solutions provider since 1982
- Culture of service excellence that puts clients' interests first
- Deep understanding of participant behavior

Investment Products

T. Rowe Price delivers options and flexibility. Clients can select from T. Rowe Price funds as well as an open architecture of investments with access to multiple fund families and strategies.

- T. Rowe Price proprietary funds (including target date and institutional class investments)
- Nonproprietary funds (over 5,000 currently on platform)
- Self-directed brokerage platform offering mutual funds only

Client Services and Support

Clients depend on their core team for superior quality, service and a plan specific knowledge base. As strategic partners, these teams help clients make the best use of innovation and firmwide resources to achieve their long-term objectives.

- 403(b)/457 Dedicated Client Team
- 403(b) pre-approved plan document
- Annual strategic plan
- A user-friendly digital experience that connects you with the tools and information you rely on to keep your plan(s) running smoothly
- Plan investment, cost, and fee reviews

- Ongoing education (client conferences, online networking, and communications)
- Dedicated contacts
- Fee guarantees and service-level agreements

Employee Services and Education

Our approach to engaging and educating employees incorporates extensive research. Designed to encourage engagement and generate better outcomes, we provide a holistic and practical experience that is integrated across communication channels. Our call center employees are salaried, not commissioned so you can have the peace of mind they are always working in your best interest.

- Required transactional and compliance communications
- Annual strategic participant communication plan
- Conversion, enrollment, and ongoing educational communications
- Online account access and retirement planning tools
- Participant Service Center and voice response system
- Modern day approach designed to meet employees where they are and when they need it

Compliance Services

Our dedicated and experienced compliance group offers education and resources necessary to help clients navigate through an ever-changing fiduciary landscape.

Services include:

- Nondiscrimination testing
- Form 5500 preparation[1]
- Annual audit support
- Recordkeeping based on individually designed plan documents
- Plan design and testing consultation

Administrative Outsourcing and Recordkeeping

Our technology and in-depth resources are always available to help ease burdensome duties so that clients can focus their efforts at a strategic level.

- Initial plan setup and conversion with ongoing mergers and acquisitions support
- Suite of automated services (enroll, invest, increase, and rebalance)
- Fully automated participant and plan-level transactions
- Electronic security (encrypted email, secure Web file transfer, SFTP)
- Quarterly participant statements
- Plan-specific reports for administrative personnel
- Custody services

Consider the investment objectives, risks, and charges and expenses carefully before investing. For a prospectus or, if available, a summary prospectus containing this and other information, call 1-800-225-5132. Read it carefully.

Let's work together.
Call **1-800-638-7890**.
Or visit **troweprice.com**.

T. Rowe Price Investment Services, Inc., distributor, T. Rowe Price mutual funds.

[1]Provided through an arrangement with a third-party provider.

T. Rowe Price Retirement Plan Services, Inc.

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