

	Basic	Premier	Premier Plus	Comprehensive
PensionEdge® Plus Portal Features				
View annual participant benefit statement	●	●	●	●
View documents	●	●	●	●
Add documents		●	●	●
View census data		●	●	●
Sponsor access Benefit Estimate Calculator		●	●	●
Participant access Benefit Estimate Calculator			●	●
Sponsor access Final Benefit Calculation		●	●	
Sponsor access Final Benefit Calculation and full benefit package request				●
Participant access Final Benefit Calculation and full benefit package request (Premium Plus: email to sponsor for completion, Comprehensive: email to H&H for completion)			●	●
Sponsor access Worktrack		●	●	●
Sponsor access standard reports and data worksheets		●	●	●
Participant Data Maintenance				
Annual census data update	●	●	●	●
Quarterly or monthly census data updates through regular payroll data feeds				●
Sponsor online participant data maintenance		●	●	●
Benefit Package & Payment Process				
Sponsor prepares (using sponsor calculation), mails, collects, audit review & follow-up	●			
Sponsor prepares (using DB PEP calculation), mails, collects, audit review & follow-up		●	●	
H&H prepares (using DB PEP calculation and sponsor approval via Worktrack), mails, collects, audit review & follow-up				●
Sponsor submits to Custodian	●	●	●	
H&H submits to Custodian				●
Sponsor reconciles distributions and repetitive benefit payments	●	●	●	
H&H reconciles distributions and repetitive benefit payments				●
PensionEdge® Service Center Assistance				
Assistance with login and web navigation	●	●	●	●
Assistance with employee requests for plan information				●
Assistance with address updates				●
Assistance with Benefit Estimate Calculator (Participant)			●	●
Assistance with Benefit Estimate Calculator (Sponsor)		●	●	●
Assistance with Final Benefit Calculation Request (Participant)				●
Assistance with Final Benefit Calculation (Sponsor)			●	●
Assistance with forms completion				●
Assistance with Payment Maintenance				●
PensionEdge® Plus Training				
Online Sponsor User Guide	●	●	●	●
Online Participant User Guide	●	●	●	●
On-site sponsor training		●	●	●