

## National 401(k) Recordkeepers

Record Keeper	Small	Mid	Large	Mega	Distrib.	Service Model
ACS				y	direct	bundled
ADP	y	y			both	bundled
Alliance Benefit Group	y				both	bundled
American Funds	y				advisor	both
Ameritas	y				advisor	bundled
Ascensus	y				advisor	bundled
ASpire	y				advisor	both
BMO		y	y		advisor	bundled
BPAS	y				both	bundled
CPI	y				advisor	bundled
Daily Access	y				advisor	bundled
Fidelity	y	y	y	y	both	bundled
Great West	y				advisor	both
Guardian	y				advisor	both
Hancock	y				advisor	both
Hewitt			y	y	direct	bundled
ING	y	y	y	y	both	both
JP Morgan	y	y	y	y	direct	bundled
Lincoln	y	y			advisor	both
MassMutual	y	y	y		advisor	both
Mercer			y	y	direct	bundled
Merrill Lynch		y	y	y	advisor	bundled
Milliman		y	y		direct	bundled
Mutual of America	y				direct	bundled
Mutual of Omaha	y				advisor	both
Nationwide	y				advisor	both
Newport		y			advisor	bundled
NY Life		y	y		advisor	bundled
OneAmerica/AUL	y				advisor	both
Pai	y				advisor	bundled
Paychex	y				both	bundled
Pentegra	y				direct	both
Principal	y	y	y		advisor	both
Prudential		y	y		advisor	bundled
Putnam		y	y		advisor	bundled
Schwab		y	y		direct	bundled
Securian	y				advisor	bundled
Standard	y				advisor	bundled
T Rowe		y	y	y	direct	bundled
Transamerica	y	y	y		advisor	both
Unified Trust	y				advisor	bundled
Vanguard		y	y	y	direct	bundled
Verisight	y				both	both
Wells Fargo	y	y	y	y	both	bundled

Small: <\$10 Million

Mid: \$10-\$100 Million

Large: \$100-\$500 Million

Mega: +\$500 Million