

Participant Process Flow

www.rolloversystems.com

About RolloverSystems, LLC »

RolloverSystems, LLC (RSI) is America's only independent fully-integrated platform designed to manage and execute end-to-end terminated participant services for retirement plan sponsors. Founded in 2001, Charlotte based RSI works with more than 7,000 retirement plan clients, containing over 850,000 participants and processes \$1B in participant transactions annually. Our team of licensed Rollover Counselors provides assistance to terminated participants of all balance sizes with education, access to objective investment choices, and transaction facilitation. RSI also specializes in plan termination assistance, automatic rollover (ARO) and missing participant services.

Key Benefits »

Sponsor

- Ensure proactive outreach to 100% of terminated participants
- Decrease costs associated with ongoing communications
- Reduce administrative burden associated with terminated and missing participants
- Automate missing participant search services

Participant

- Access to experienced, licensed counselors
- Education and guidance about distributions and investments
- Access to independent investments from top providers

