



PLAN HEALTH REPORTING

The Financial Fitness for Life Program drives and delivers real results.

INDUSTRY: Construction

FOUNDED: 1970's

SERVICING: Midwest

BACKGROUND

For the past four decades, a *Midwest construction company* has grown to become one of the largest, most successful commercial contractors, with offices and job-sites throughout the country. The company's rapid growth and high quality of work can be attributed to exceptional leadership.

The sense of responsibility the company's leadership felt regarding employee safety on the job-site was also felt when it came to providing a quality benefit program.

In 2010, this company made the decision to partner with us. This partnership's goal was to help employees make sound financial and retirement decisions. The information on the following page demonstrates how this goal was met.

COMPANY HIGHLIGHTS

- Winner of a National Safety Excellence Award
- Top 500 minority-owned businesses in the country
- Received high honor awards from the U.S. Green Building Council
- 8th Corporate Office opened in 2012
- Founded a program designed to implement extremely high safety standards

Out of respect for our clients, the company name has been left off this case study. If you would like to discuss any data or statistics documented in this case study, please contact your advisor.

fit: financial fitness for life
PARTICIPANT SUCCESS PROGRAM

THE RESULTS

PLAN METRIC CHALLENGES

Low Participation
Low Deferral Percentages

STRATEGIES IMPLEMENTED

80+ Employee On-Site Meetings
Quarterly Investment Committee Meetings
Risk Tolerance Assessments
9 Advisors Deployed
Continued Face-to-Face Meetings



PERCENTAGE IMPACT BY CATEGORY

Average Deferral Rate¹

+42%

Participation Rate²

+23%

Average # of Holdings³

+215%



PLAN METRICS PRIOR TO OUR SERVICES

Average Deferral Rate



4.71%

Participation Rate



57%

Average # of Holdings



3.21

PLAN METRICS AFTER STRATEGY IMPLEMENTATION*

Average Deferral Rate



6.70%

Participation Rate



70.30%

Average # of Holdings



10.12

Resulting Change (+/-)
+1.99%¹

Resulting Change (+/-)
+13.30%²

Resulting Change (+/-)
+6.91%³

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.

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¹ A 42% increase in the Average Deferral Rate is the result of the Deferral Rate increasing from 4.71% to 6.7% (+1.99%)

² A 23% increase in the Participation Rate is the result of the Participation Rate increasing from 57% to 70.30% (+13.30%)

³ A 215% increase in the Average # of Holdings is the result of the Average # of Funds increasing from 3.21 to 10.12 (+6.91)

* Numbers as of Q4 2014