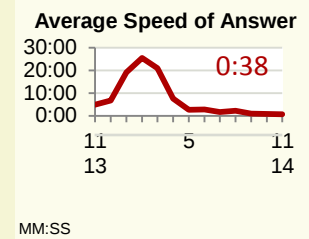
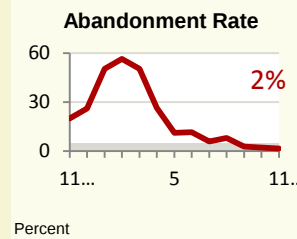
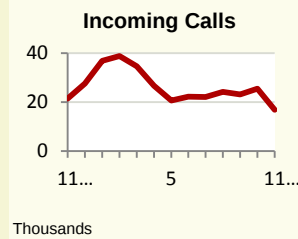
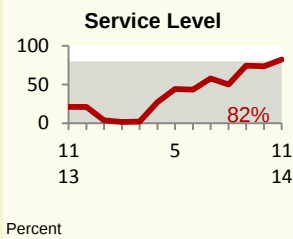


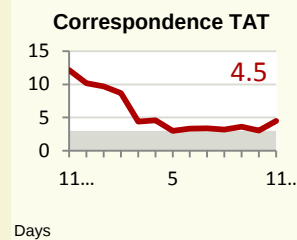
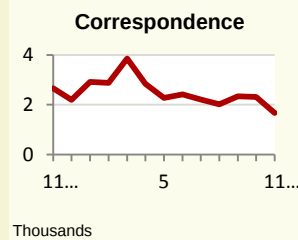
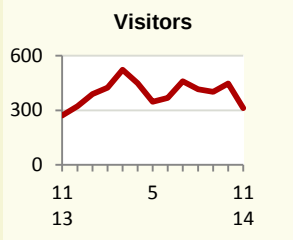
RSD Dashboard

November-14

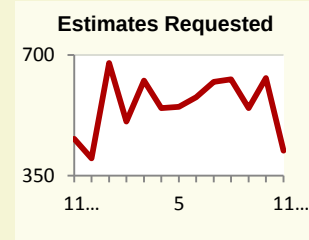
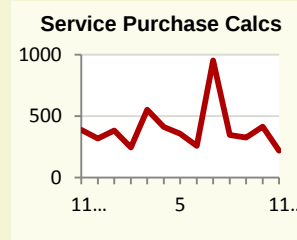
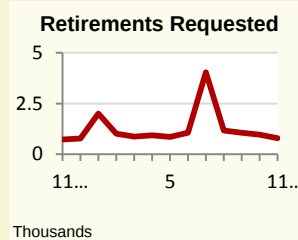
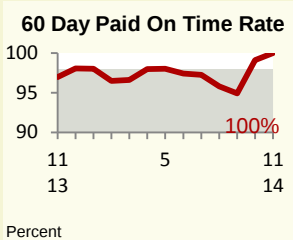
Call Center



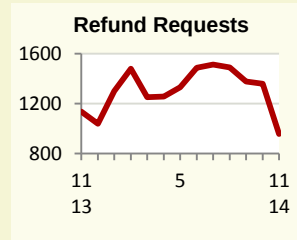
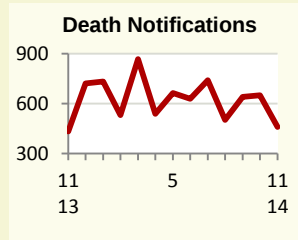
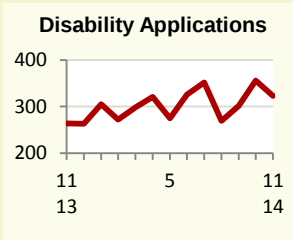
Educational Retirement Group



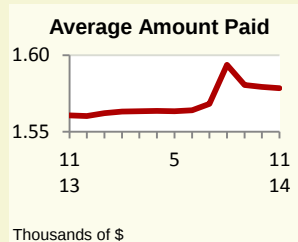
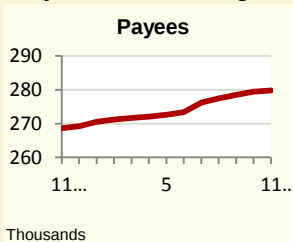
Retirement Processing



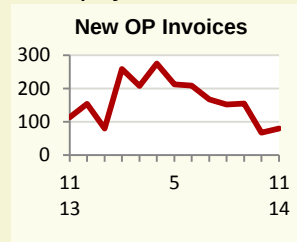
Benefit Processing



Payroll Processing



Overpayments



Supplemental Retirement Plans - Key Metrics (Stop Light)

Retirement Readiness*																	Annual Benefit Statement Assumptions:																									
				2014		ACTUAL		67.56%		GOAL		60.00%		Retirement Age - 62 years																												
				2015						70.00%		Life Expectancy - 90 years																														
				2020						90.00%		Assumed rate of returns - 5%																														
PARTICIPANT ACTIVITY	401(K) - 457																	401(k) - 457					403(b)																			
	<u>Participation</u>	<u>ACTUAL</u>	<u>GOAL</u>	<u>Difference</u>	<u>Contribution</u>	<u>ACTUAL</u>	<u>GOAL</u>	<u>Difference</u>	<u>Asset Allocation - New Members</u>	<u>ACTUAL</u>	<u>GOAL</u>	<u>Difference</u>	<u>Asset Allocation - All Members</u>	<u>ACTUAL</u>	<u>GOAL</u>	<u>Difference</u>	<u>Asset Allocation - All Members</u>	<u>ACTUAL</u>	<u>GOAL</u>	<u>Difference</u>																						
	401(k)	26.63%	27.00%	↔	401(k)	\$160.70	\$160.00	↑	401(k)	92.43%	89.50%	↑	401(k)	54.58%	55.00%	↔	TD usage	NA	90.00%																							
	457	11.22%	12.25%	↓	457	\$132.39	\$130.00	↑	457	93.06%	91.50%	↑	457	55.27%	55.00%	↑	TD AUM	NA	55.00%																							
	Combined 401(k) & 457(b)	29.41%	NA		Combined 401(k) & 457(b)	\$177.03	NA		Combined 401(k) & 457(b)	94.13%	NA		Combined 401(k) & 457(b)	54.58%	NA																											
	403(b)	NA	3.00%		403(b)	\$304.05	\$140.00	↑									Counseling	NA	1500																							
EMPLOYER ACTIVITY	<u>Percentage Satisfied or Extremely Satisfied</u>								<u>NC 403(b) Program Adoptions:</u>																																	
									Activity for Year to Date (School Districts adopted either as Sole Recordkeeper or one of the Multiple Recordkeeper option)								<u>ACTUAL</u>								<u>GOAL</u>								<u>Difference</u>									
	Prudential* TIAA CREF								85.16% TBD								33								50***								↔									
RECORD KEEPER PERFORMANCE (Customer Service)	<u>Percentage Satisfied or Extremely Satisfied</u>			<u>ACTUAL</u>			<u>GOAL</u>			<u>Difference</u>			<u>Call Center Speed to Answer</u>			<u>ACTUAL</u>			<u>GOAL</u>			<u>Difference</u>			<u>Call Center Abandon %</u>			<u>ACTUAL</u>			<u>GOAL</u>			<u>Difference</u>								
	Prudential*			73.70%			TBD			Prudential			MET			TBD			TBD			33 secs			TBD			TBD			Prudential			1.50%			TBD					
	TIAA CREF			93%			91%†			TIAA CREF			MET			TBD			TBD			TIAA CREF			36 secs			TBD			TBD			TIAA CREF			3.00%			TBD		