

Notice-DIRECT

Simplify Distribution of Participant Notices & Communication



As an employer that provides a retirement plan, you have an obligation to provide various notices and other important communications to your employees. JULY's Notice-DIRECT solution is designed to simplify the distribution of notices and reduce the likelihood of penalties.

How it Works

With **Notice-DIRECT** – JULY sends notices per each of your requests, just provide us an employee census file.



Benefits and Features

Benefits and features:

- *Simplifies the Process* – You tell us that you want to send a notice and we do the rest.
- *Reduces Liability* – We ensure notices are distributed by the due date which may help reduce the likelihood of penalties and unplanned costs.
- *Improves Participant Outcomes* – By ensuring notices are provided timely, participants are better informed of their choices helping them to improve their retirement readiness.

Types of Notices

Depending on your plan, you may be required to distribute the following notices.

Name	Description
Summary Plan Description (SPD)	All Plans - Must be provided to employees upon becoming eligible.
Summary of Materials Modifications (SMM)	All Plans - Must be provided to eligible participants and participants when certain amendments are adopted.
Summary Annual Report (SAR)	All Plans - Must be provided annually two months after the Form 5500 due date.
Safe Harbor Notice	Safe-Harbor 401k Plans - Must be provided annually 30 days before the plan year begins.
Investment Change Notice	Most 401k Plans - Must be provided at least 30 days before investment changes.
QDIA Notice	Most 401k Plans - Must be provided annually 30 days before the plan year begins.
Fee Disclosure Notice	Most Plans - Must be provided annually to disclose information about fees.
Other Notices	Various Plan Types - Other notices may be required based on your plan type.

Notice-DIRECT Pricing

Please see next page for pricing details.

For Additional Information

Please contact your Client Service Manager at 888.333.5859 or fulfillment@julyservices.com.

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Notice-DIRECT – See Pricing Grid Below

Eligible Participants*	- 1 to 4 Pages - 2 Sided Print - \$200 Minimum	- 5 to 10 Pages - 2 Sided Print - \$200 Minimum	- 11 to 20 Pages - 1/2 Page Booklet - \$220 Minimum	- 21 to 50 Pages - 1/2 Page Booklet - \$230 Minimum	- 50 Plus Pages - 1/2 Page Booklet
1 to 20	\$200 - 2 sided print	\$200 - 2 sided print	\$220 - 1/2 page booklet	\$230 - 1/2 page booklet	custom quote
21 to 30	\$8.75 per	\$9.00 per	\$9.25 per	\$9.95 per	custom quote
31 to 40	\$6.75 per	\$7.00 per	\$7.25 per	\$7.95 per	custom quote
41 to 50	\$5.50 per	\$5.75 per	\$6.00 per	\$6.70 per	custom quote
51 to 60	\$4.75 per	\$5.00 Per	\$5.25 per	\$5.95 per	custom quote
61 to 70	\$4.50 per	\$4.75 per	\$5.00 per	\$5.70 per	custom quote
71 to 80	\$4.00 per	\$4.25 per	\$4.50 per	\$5.20 per	custom quote
81 to 90	\$3.75 per	\$4.00 per	\$4.25 per	\$4.95 per	custom quote
91 to 100	\$3.50 per	\$3.75 per	\$4.00 per	\$4.70 per	custom quote
101 and up	custom quote	custom quote	custom quote	custom quote	custom quote

* Eligible Participants = all eligible employees and participants with a balance in the plan (active, non-active, terminated, etc.).