



State of Vermont

Plan Summary

Presented by: Gabriel D'Ulisse
Vice President and Managing Director

As of: March 31, 2018

*Report contains information up
through the last business day of
the period end.*

Plan Summary 940050-State of Vermont Deferred Compensation Plan

Plan Summary and Benchmark Trends

Plan Demographics Summary

	1/1/2018- 3/31/2018
Total Participants*	7,247
Active Participants	5,414
Terminated Participants	1,822
Suspended Participants	2
Multiple Status Participants***	9
Average Participant Balance	\$66,065
Average Account Balance for Active Participants	\$56,021
Median Participant Balance	\$26,389
Median Participant Balance for Active Participants	\$22,418
Participants Age 50 and Over	4,323
Total Assets for Participants Age 50 and Over	\$397,453,851
Total (Contributions + Rollovers In)	\$4,043,170
Employee Contributions	\$3,943,704
Rollovers In	\$99,466
Total Distributions	(\$5,048,902)
Percentage of Assets Distributed	1.1%
Total Participant Balances	\$478,772,329

*Participant(s) with an account balance greater than \$0.

*** Participant(s) with an account balance greater than \$0 in more than one participant status category (e.g. Active status in one subplan but Terminated status in another subplan).

Rollovers In is the total dollars credited to participant accounts within the period defined that originated in other qualified retirement plan accounts.

Plan Features

GoalMaker	3/31/2018
Plan Assets for Participants in GoalMaker	\$8,828,353
% of Plan Assets for GoalMaker Participants	1.8%
# of Participants in GoalMaker	236
Participation Rate in GoalMaker	3.3%
Prudential % of Participants in GoalMaker - As of 12/31/2017	50.7%

Roth	3/31/2018
Roth Assets	\$8,764,752
# of Participants in Roth	1,064
Participation Rate in Roth	14.7%
Prudential % of Participants in Roth - As of 12/31/2017	7.6%

Stable Value	3/31/2018
Participation Rate in Stable Value	62.0%
% of Plan Assets in Stable Value	19.9%
Prudential % of Plan Assets in Stable Value - As of 12/31/2017	24.5%

Participant Activity

Call Center / Website Statistics	1/1/2018 - 3/31/2018
Total Call Volume	1,627
Total Web Logins	17,901

Transaction Summary

Transactions	1/1/2018 - 3/31/2018
Total Enrollees*	138
Number of Participants with Transfers	588
Distributions	543

*Number of participants that were enrolled into the plan within the reporting period. This can include those individuals who self enrolled or auto enrolled, if applicable on the plan. Rehires may not be included if their original enrollment date falls outside the reporting period.

Benchmark Trends – Plan Features

<u>Plan Features</u>	<u>Your Plan</u>	<u>Prudential Book of Business</u>	<u>Industry Average*</u>	<u>Plan Sponsor Survey 2017**</u>	<u>Plan Sponsor Survey 2018***</u>
Auto Enrollment	No	50.2%	29.2%	41.7%	41.3%
Auto Enrollment Default Rate	NA	3% (48.0% of Plans)	30.8%	40.9%	40.7%
Contribution Accelerator	No	45.9%	16.3%	35.3%	33.6%
GoalMaker®	Yes	71.5%	NA	NA	NA
Investment Options	24.0	12.9	26.5	22.6	22.8
IncomeFlex®	No	25.4%	14.8%	3.6%	7.1%
Loans	No	63.5%	65.4%	79.3%	79.3%
Plan Allows Roth	Yes	25.6%	58.1%	65.2%	68.5%
Plan Allows Catch-Up Contributions	Yes	48.1%	NA	NA	NA

This information should not be considered an offer or solicitation of securities, insurance products or services. No offer is intended nor should this material be construed as an offer of any product.

The information is being presented by us solely in our role as the plan's service provider and/or record keeper.

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Prudential's Book of Business averages are as of 12/31/2017

External Benchmark Source: **PLANSPONSOR Defined Contribution Annual Survey**

*Annual Survey, 2018 (Industry Specific Results) – Government - All Segments

**2017 Annual Survey, 2017 (Overall)

***2018 Annual Survey, 2018 (Overall)

Benchmark Trends – Participant Behavior

<u>Plan Features</u>	<u>Your Plan</u>	<u>Prudential Book of Business</u>	<u>Industry Average*</u>	<u>Plan Sponsor Survey 2017**</u>	<u>Plan Sponsor Survey 2018***</u>
Participation Rate	76.1%	70.4%	65.9%	78.5%	79.3%
Average Contribution Rate (%)	NA	7.4%	6.6%	6.6%	6.6%
Average Account Balance	\$66,065	\$67,979	\$63,814	\$87,038	\$97,903
Median Account Balance	\$26,389	\$68,666	\$50,342	\$65,000	\$75,000
% of Plan Assets in Stable Value	19.9%	24.5%	NA	NA	NA
% of Plan Assets in Day One Funds	NA	1.1%	NA	NA	NA
Average # of Funds Held	5.6	5.7	5.4	5.3	5.7
% of 55+ participants utilizing IncomeFlex	NA	12.0%	NA	NA	NA
% of participants utilizing GoalMaker	3.3%	50.7%	NA	NA	NA
% of participants have outstanding active loans	NA	14.4%	13.6%	13.7%	13.0%
Average Loan Balance	NA	\$7,536	\$9,617	\$9,495	\$10,189

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External Benchmark Source: **PLANSPONSOR Defined Contribution Annual Survey**

*Annual Survey, 2018 (Industry Specific Results) – Government - All Segments

**2017 Annual Survey, 2017 (Overall)

***2018 Annual Survey, 2018 (Overall)

Asset Allocation/Net Activity By Age

January 1, 2018 to March 31, 2018

	Less than 25	25-34	35-44	45-54	55-64	65+	Total
Total Participant Balances	\$164,197	\$7,632,318	\$32,530,001	\$95,528,400	\$176,640,917	\$166,276,496	\$478,772,329
% Assets	0.0%	1.6%	6.8%	20.0%	36.9%	34.7%	100.0%
Average Contribution Rate (\$)	\$20	\$175	\$117	\$209	\$677	\$195	\$304
<i>Prudential Avg. Contribution Rate (%) as of 12/31/2017</i>	4.6%	5.7%	6.6%	7.8%	9.5%	11.2%	7.4%
Contributions	\$25,762	\$306,125	\$544,600	\$1,199,167	\$1,492,732	\$375,318	\$3,943,704
Rollovers In*	\$0	\$1,095	\$14,795	\$83,576	\$0	\$0	\$99,466
Total (Contributions + Rollovers In)	\$25,762	\$307,220	\$559,395	\$1,282,743	\$1,492,732	\$375,318	\$4,043,170
Cash Distributions	\$0	(\$20,145)	(\$35,110)	(\$379,139)	(\$628,953)	(\$745,823)	(\$1,809,170)
Rollovers Out	\$0	(\$336)	(\$26,579)	(\$342,617)	(\$917,347)	(\$1,952,853)	(\$3,239,731)
Total (Cash Distributions + Rollovers Out)	\$0	(\$20,481)	(\$61,688)	(\$721,755)	(\$1,546,300)	(\$2,698,677)	(\$5,048,902)
Net Activity	\$25,762	\$286,738	\$497,707	\$560,987	(\$53,568)	(\$2,323,358)	(\$1,005,732)
Total Participants	71	762	1,180	1,864	2,024	1,347	7,248
Average Account Balance	\$2,313	\$10,016	\$27,568	\$51,249	\$87,273	\$123,442	\$66,056
Median Account Balance	\$1,778	\$4,897	\$14,185	\$26,607	\$45,623	\$63,694	\$26,389
<i>Prudential Avg. Account Balance as of 12/31/2017</i>	\$3,047	\$15,001	\$42,701	\$81,849	\$111,172	\$116,430	\$67,979

*Rollovers In is the total dollars credited to participant accounts within the period defined that originated in other qualified retirement plan accounts.

Retirement Readiness

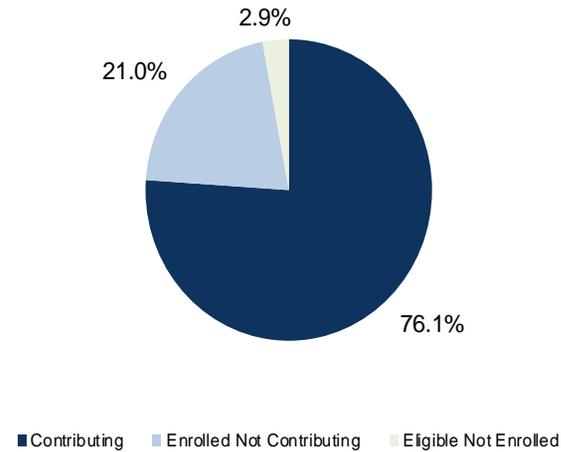
Participation Rate

	1/1/2018-3/31/2018
Total Eligible To Contribute Population	5,610
Contributing (A)	4,267
Enrolled Not Contributing (B)	1,178
Eligible Not Enrolled (C)	165

	1/1/2018-3/31/2018
Participation Rate *	76.1%
<i>Prudential Book of Business 12/31/2017</i>	70.4%
<i>Plan Sponsor Survey 2018 - National Average</i>	79.3%

* Participation Rate is calculated by $A/(A+B+C)$

1/1/2018-3/31/2018



Definitions:

Contributing – Count of participants who are active/eligible and a contribution was received to an employee source (within the reporting period).

Enrolled Not Contributing – An individual who is enrolled in the plan, but did not have a contribution to an employee source (within the reporting period).

Eligible Not Enrolled – An individual who meets the requirements to join the plan, but has not enrolled in the plan (as of close of business on the last business day of the period).

Due to rounding, pie chart may not equal 100%

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Retirement Income Calculator (RIC) Analysis

1/1/2018 - 3/31/2018	
Total Retirement Income Calculator Completions	1,174
Unique Completions	914
Contribution Rate Increase	0

Since Inception for Currently Active Participants as of 3/31/2018	
Average Balance, RIC Participant	\$71,944
Average Balance, Non-RIC Participant	\$52,821
Average Contribution Rate, RIC Participant	0.00%
Average Contribution Rate, Non-RIC Participant	0.00%
Total Count of Participants with a RIC Gap	668
Average RIC Gap	\$3,095
Total Count of Participants with a RIC Surplus	243
Average RIC Surplus	\$3,574
Average Income Replacement, RIC Participant	68%
Average Income Replacement, Non-RIC Participant	0%

Total Retirement Income Calculator Completions - Number of RIC completions for the given time period. If a single participant completed the RIC multiple times within the given time period, they would be counted multiple times.

Unique Completions: Total number of unique active/eligibles that completed the retirement income calculator during the reporting period

Contribution Rate Increases: Total number of active/eligibles that completed the retirement income calculator and increased their contribution rate.

Average Balance RIC Participant - For participants who have a balance greater than \$0 that have previously completed the RIC - The total balance of active participants divided by the total count of active participants

Average Balance Non-RIC Participant - For participants who have a balance greater than \$0 that have NOT previously completed the RIC - The total balance of active participants divided by the total count of active participants

Average Contribution Rate RIC Participant - For participants who have completed the RIC - The total of all contribution rates (%) for active participants who have completed the RIC divided by the number of active participants that have completed the RIC who have non-zero contribution rates.

Average Contribution Rate Non RIC Participant - For participants who have NOT completed the RIC - The total of all contribution rates (%) for active participants who have completed the RIC divided by the number of active participants that have completed the RIC who have non-zero contribution rates.

Average Income Replacement, RIC Participant - Calculated by summing the income replacement percentages of all active, eligible & suspended participants who have completed the RIC divided by the total count of all those active, eligible & suspended participants that have completed the RIC. Individuals not enrolled in the plan are excluded from the calculation.

Average Income Replacement, Non- RIC Participant - Calculated by summing the income replacement percentages of all active, eligible & suspended participants who have not completed the RIC divided by the total count of all those active, eligible & suspended participants that have completed the RIC. Individuals not enrolled in the plan are excluded from the calculation.

Participant - An individual who has enrolled in the plan and has a non-zero account balance.

Plan Activity

Contributions by Fund

INVESTMENT OPTIONS	1/1/2018 - 3/31/2018	%
STATE OF VERMONT STABLE VALUE	\$455,821	11.6%
VANGUARD INSTITUTIONAL INDEX I	\$350,087	8.9%
T. ROWE PRICE RETIREMENT I 2020 I	\$336,325	8.5%
VANGUARD MID CAP INDEX INSTITUTIONAL	\$303,377	7.7%
T. ROWE PRICE RETIREMENT I 2030 I	\$303,354	7.7%
AMERICAN FUNDS GROWTH FUND OF AMER R6	\$258,162	6.6%
VANGUARD VALUE INDEX I	\$239,464	6.1%
T. ROWE PRICE SMALL-CAP STOCK I	\$211,931	5.4%
T. ROWE PRICE RETIREMENT I 2040 I	\$183,598	4.7%
VANGUARD TOTAL BOND MARKET INDEX I	\$182,585	4.6%
VANGUARD DEVELOPED MARKETS INDEX INSTL	\$173,605	4.4%
DODGE & COX INTERNATIONAL STOCK	\$165,041	4.2%
DODGE & COX BALANCED	\$157,353	4.0%
LAZARD EMERGING MARKETS EQUITY INSTL	\$110,641	2.8%
VANGUARD FTSE SOCIAL INDEX I	\$102,399	2.6%
T. ROWE PRICE RETIREMENT I 2010 I	\$80,972	2.1%
T. ROWE PRICE RETIREMENT I 2050 I	\$66,074	1.7%
CALVERT BOND I	\$65,418	1.7%
PIMCO TOTAL RETURN ESG INSTITUTIONAL	\$60,371	1.5%
FPA NEW INCOME	\$39,138	1.0%
PAX GLOBAL ENVIRONMENTAL MRKTS INSTL	\$35,377	0.9%
T. ROWE PRICE BALANCED I	\$31,831	0.8%
PAX BALANCED INDIVIDUAL INVESTOR	\$26,138	0.7%
T. ROWE PRICE RETIREMENT BALANCED I	\$4,644	0.1%
Total Assets Contributed	\$3,943,704	100.0%

Interfund Transfers

1/1/2018 to 3/31/2018

INVESTMENT OPTIONS	IN	OUT	NET
T. ROWE PRICE RETIREMENT BALANCED I	\$4,075,782	\$0	\$4,075,782
STATE OF VERMONT STABLE VALUE	\$4,057,758	(\$1,487,862)	\$2,569,896
VANGUARD DEVELOPED MARKETS INDEX INSTL	\$1,313,489	(\$169,255)	\$1,144,234
VANGUARD TOTAL BOND MARKET INDEX I	\$1,212,934	(\$197,127)	\$1,015,807
FPA NEW INCOME	\$430,009	(\$48,514)	\$381,495
AMERICAN FUNDS GROWTH FUND OF AMER R6	\$887,008	(\$617,342)	\$269,666
VANGUARD VALUE INDEX I	\$652,425	(\$449,634)	\$202,791
SELF DIRECTED BROKERAGE ACCOUNT	\$100,847	(\$59,060)	\$41,787
T. ROWE PRICE RETIREMENT I 2010 I	\$229,715	(\$208,054)	\$21,661
T. ROWE PRICE RETIREMENT I 2050 I	\$65,563	(\$133,012)	(\$67,449)
PAX BALANCED INDIVIDUAL INVESTOR	\$8,777	(\$134,448)	(\$125,670)
PIMCO TOTAL RETURN ESG INSTITUTIONAL	\$101,055	(\$274,063)	(\$173,008)
VANGUARD FTSE SOCIAL INDEX I	\$263,611	(\$457,442)	(\$193,831)
PAX GLOBAL ENVIRONMENTAL MRKTS INSTL	\$41,310	(\$268,070)	(\$226,760)
LAZARD EMERGING MARKETS EQUITY INSTL	\$241,385	(\$493,243)	(\$251,858)
T. ROWE PRICE SMALL-CAP STOCK I	\$360,786	(\$633,459)	(\$272,673)
T. ROWE PRICE RETIREMENT I 2030 I	\$201,553	(\$497,929)	(\$296,376)
T. ROWE PRICE RETIREMENT I 2040 I	\$40,773	(\$340,130)	(\$299,357)
VANGUARD MID CAP INDEX INSTITUTIONAL	\$402,222	(\$714,614)	(\$312,392)
CALVERT BOND I	\$105,359	(\$476,202)	(\$370,843)
T. ROWE PRICE RETIREMENT I 2020 I	\$348,182	(\$797,211)	(\$449,029)
DODGE & COX INTERNATIONAL STOCK	\$33,159	(\$579,447)	(\$546,288)
DODGE & COX BALANCED	\$170,265	(\$935,768)	(\$765,503)
VANGUARD INSTITUTIONAL INDEX I	\$436,889	(\$1,328,622)	(\$891,733)
T. ROWE PRICE BALANCED I	\$108,410	(\$4,588,757)	(\$4,480,347)
TOTAL	\$15,889,266	(\$15,889,266)	\$0

Participant Distribution Statistics

Distribution Type	Amount of Withdrawals Taken	# of Withdrawals
	1/1/2018 - 3/31/2018	1/1/2018 - 3/31/2018
Termination	\$3,902,876	108
Direct Transfer	\$246,354	5
Installment Payment	\$397,312	309
Death Distribution	\$302,544	5
QDRO	\$111,126	2
Required Minimum Distribution	\$71,410	22
In-Service Withdrawal	\$15,099	3
Hardship Withdrawal	\$1,951	1
Gross Adjustment	\$230	88
Grand Total	\$5,048,902	543

1/1/2018 - 3/31/2018						
Distribution Sub-Type	Amount of Withdrawals Taken			# of Withdrawals		
	Age < 50	Age >= 50	Total	Age < 50	Age >= 50	Total
Rollover	\$231,401	\$3,008,330	\$3,239,731	7	25	32
Cash	\$96,231	\$1,712,939	\$1,809,170	8	503	511
Grand Total	\$327,633	\$4,721,269	\$5,048,902	15	528	543

Termination - A withdrawal that is taken when the participant is active and terminating from employment or is already in a 'Terminated' status.

Direct Transfer - Non-taxable transfer of participant assets from one type of tax-deferred retirement plan or account to another.

Installment Payment - An Installment distribution is a payment option that disburses funds over time (i.e. monthly, quarterly, yearly).

Death Distribution - Distribution taken by a beneficiary. This could include required minimum distributions, installment payments, etc.

QDRO - Distribution taken by the recipient of a QDRO. This could include required minimum distributions, installment payments, etc.

Required Minimum Distribution - Minimum amounts that a participant must withdraw annually upon reaching a certain age or retirement. This would exclude any beneficiary or QDRO accounts.

In-Service Withdrawal - A distribution that is taken while the participant is still active, before termination from employment.

Hardship Withdrawal - A distribution which is requested by a participant because of an immediate and heavy financial need that cannot be satisfied from other resources.

Gross Adjustment - The total of all adjustments made to an account or plan in absolute terms, regardless of whether or not the adjustments were positive or negative.

Participant Transaction Statistics

	1/1/2018 - 3/31/2018
Call Center	
Unique Callers	958
Total Call Volume	1,627
Participant Website	
Unique Web Logins	3,291
Total Web Logins	17,901

Call Center Reason Category	1/1/2018 - 3/31/2018
Account Explanations	581
Allocations and Exchanges	43
Contributions	43
Disbursements	536
Enrollments	6
Forms	14
Fund Information	26
Hardships	12
IFX	1
IVR or Web Assistance	202
Loans	4
Payment Questions	0
Plan Explanations	92
Status of Research	26
Tax Information	3
Website Processing	38
Total	1,627

Definitions:

Unique Callers – The number of individuals that spoke to a Participant Service Center Representative during the reporting period (e.g., If the same individual called five times during the reporting period, they would only be counted once).

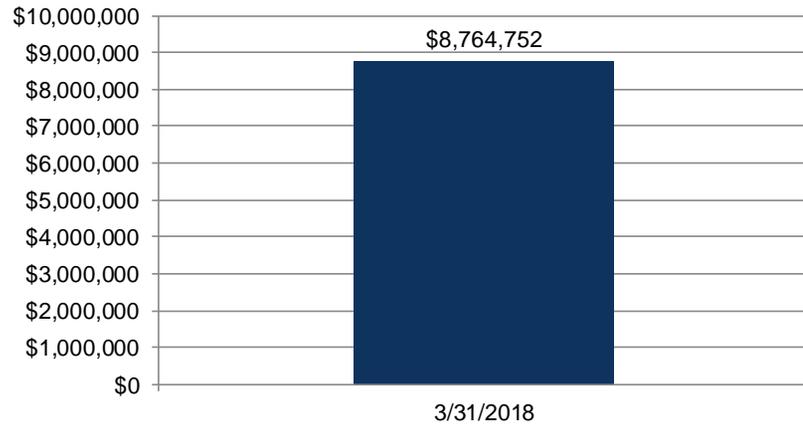
Total Call Volume – The number of calls to a Participant Service Center Representative during the reporting period (e.g., If the same individual called five times during the reporting period, they would be counted five times).

Unique Web Logins – The number of individuals that logged into the Participant Website during the reporting period (e.g., If the same individual logged-in five times during the reporting period, they would only be counted once).

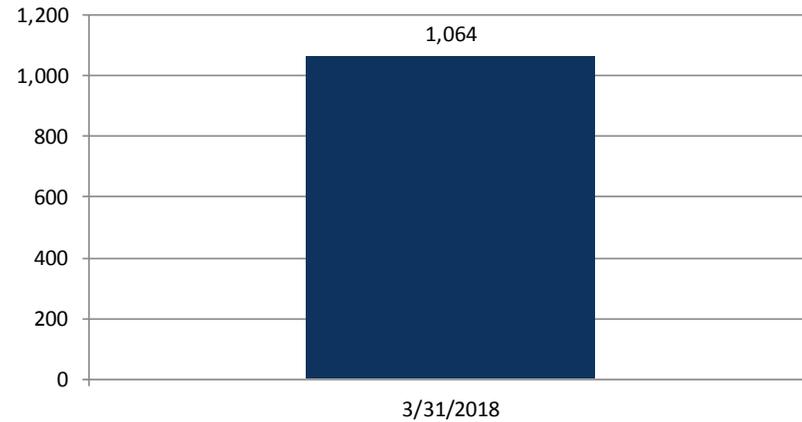
Total Web Logins – The number of logins to the Participant Website during the reporting period (e.g., If the same individual logged-in five times during the reporting period, they would be counted five times).

Roth Summary

Roth Assets



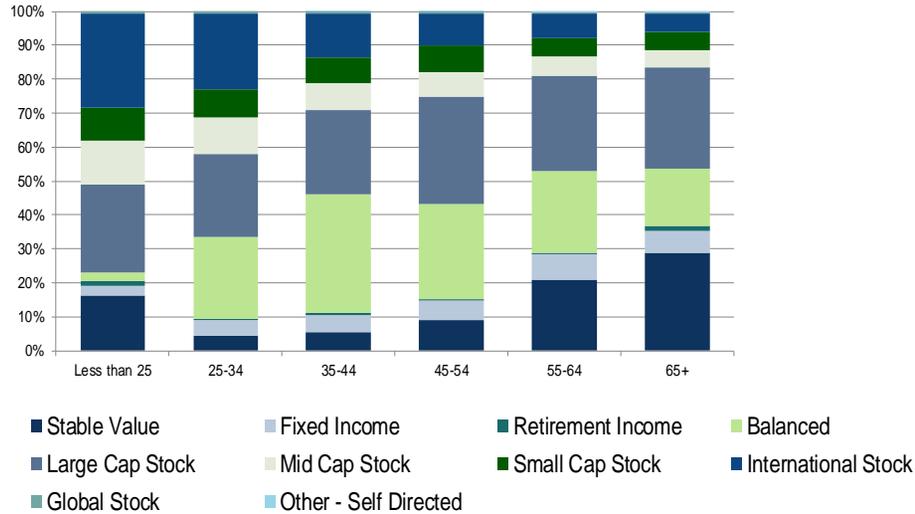
Roth Participants



	3/31/2018
Roth Assets	\$8,764,752
# of Participants in Roth	1,064
Participation Rate in Roth	14.7%
Prudential % of Participants in Roth - As of 12/31/2017	7.6%

Investment Diversification

Assets by Asset Class and Age as of March 31, 2018



Asset Allocation

Asset Class	Your Plan Assets as of 3/31/2018	Your Plan % as of 3/31/2018
Stable Value	\$95,106,295	19.9%
Fixed Income	\$31,692,057	6.6%
Retirement Income	\$4,106,275	0.9%
Balanced	\$110,283,377	23.0%
Large Cap Stock	\$139,823,170	29.2%
Mid Cap Stock	\$27,948,481	5.8%
Small Cap Stock	\$29,456,347	6.2%
International Stock	\$36,852,193	7.7%
Global Stock	\$2,316,106	0.5%
Other - Self Directed	\$1,188,027	0.3%
Total Participant Balances	\$478,772,329	100.0%

Fund Utilization By Age as of March 31, 2018

	Less than 25	25-34	35-44	45-54	55-64	65+	Total
Participants Invested in Only One Fund	10	130	276	438	517	425	1,796
Average # of Funds per Participant	8.3	8.3	6.9	5.8	4.9	3.9	5.6
<i>Prudential Participants Avg. # of Funds per Participant as of 12/31/2017</i>	6.4	6.3	6.0	5.8	5.5	4.1	5.7
% of Plan Assets in Stable Value	16.2%	4.2%	5.6%	8.9%	20.7%	28.8%	19.9%
<i>Prudential % of Plan Assets in Stable Value as of 12/31/2017</i>	11.6%	9.9%	11.9%	17.0%	28.4%	45.7%	24.5%
Self Directed Brokerage # of Participants	0	0	2	1	5	1	9

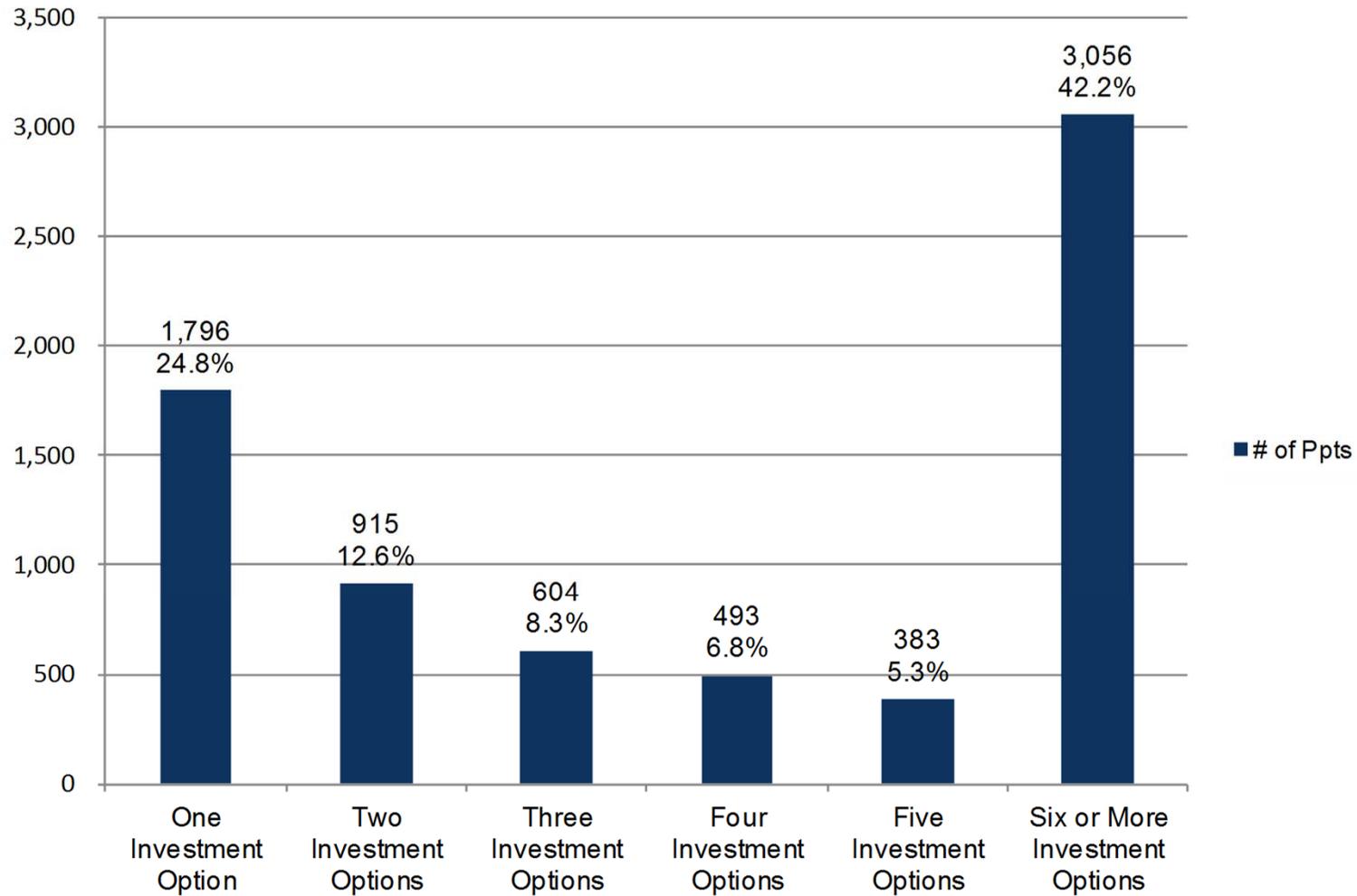
Utilization by Fund

as of March 31, 2018

INVESTMENT OPTIONS	Balance	# of Ppts	Ppts Using as Sole Investment
STATE OF VERMONT STABLE VALUE	\$95,106,295	4,492	583
VANGUARD INSTITUTIONAL INDEX I	\$55,858,161	3,270	99
DODGE & COX BALANCED	\$38,079,210	1,259	56
AMERICAN FUNDS GROWTH FUND OF AMER R6	\$36,655,975	3,371	25
VANGUARD VALUE INDEX I	\$30,032,391	3,240	12
T. ROWE PRICE SMALL-CAP STOCK I	\$29,456,347	3,353	9
T. ROWE PRICE RETIREMENT I 2020 I	\$28,275,140	683	266
VANGUARD MID CAP INDEX INSTITUTIONAL	\$27,948,481	3,287	14
T. ROWE PRICE RETIREMENT I 2030 I	\$19,293,438	628	245
DODGE & COX INTERNATIONAL STOCK	\$17,351,213	2,592	5
VANGUARD FTSE SOCIAL INDEX I	\$17,276,643	671	26
VANGUARD TOTAL BOND MARKET INDEX I	\$12,489,966	2,400	0
T. ROWE PRICE RETIREMENT I 2040 I	\$10,735,682	492	215
T. ROWE PRICE RETIREMENT I 2010 I	\$9,890,868	296	118
LAZARD EMERGING MARKETS EQUITY INSTL	\$9,880,271	2,450	7
VANGUARD DEVELOPED MARKETS INDEX INSTL	\$9,620,709	2,384	0
PIMCO TOTAL RETURN ESG INSTITUTIONAL	\$7,331,678	2,192	2
FPA NEW INCOME	\$6,339,978	402	6
CALVERT BOND I	\$5,530,435	1,973	1
T. ROWE PRICE RETIREMENT BALANCED I	\$4,106,275	251	50
PAX GLOBAL ENVIRONMENTAL MRKTS INSTL	\$2,316,106	780	4
PAX BALANCED INDIVIDUAL INVESTOR	\$2,169,416	202	2
T. ROWE PRICE RETIREMENT I 2050 I	\$1,839,622	171	51
SELF DIRECTED BROKERAGE ACCOUNT	\$1,188,027	9	0
Total	\$478,772,329		

The funds in **bold** type denote inclusion in the GoalMaker® product.

Investment Utilization as of March 31, 2018



Due to rounding, bar graph may not equal 100%

GoalMaker® Participation

as of 3/31/2018

	3/31/2018
Plan Assets for Participants in GoalMaker	\$8,828,353
# of Participants in GoalMaker	236
Participation Rate in GoalMaker	3.3%
% of Plan Assets for GoalMaker Participants	1.8%

Prudential Book of Business For Plans Offering GoalMaker – As of 12/31/2017

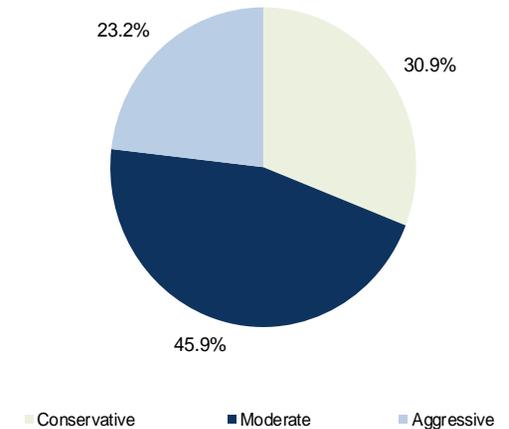
The participation rate in GoalMaker is 50.7%.

The percentage of plan assets for GoalMaker participants is 21.7%.

Participant Age Range	Conservative		Moderate		Aggressive		Total
	Active/Suspended	Terminated	Active/Suspended	Terminated	Active/Suspended	Terminated	
Less than 25	1	0	5	0	3	0	9
25-34	2	0	23	0	20	1	46
35-44	5	0	29	1	17	0	52
45-54	9	2	37	1	20	1	70
55-64	11	4	25	3	6	0	49
65+	2	3	3	1	0	1	10
Total	30	9	122	6	66	3	236

Participant Age Range	Conservative		Moderate		Aggressive		Total
	Active/Suspended	Terminated	Active/Suspended	Terminated	Active/Suspended	Terminated	
Less than 25	\$25	\$0	\$5,804	\$0	\$462	\$0	\$6,291
25-34	\$3,431	\$0	\$137,960	\$0	\$285,124	\$10,073	\$436,588
35-44	\$72,946	\$0	\$444,559	\$24,930	\$493,485	\$0	\$1,035,921
45-54	\$360,473	\$51,865	\$1,040,980	\$110,817	\$978,946	\$58,134	\$2,601,215
55-64	\$337,996	\$1,393,521	\$1,551,155	\$278,372	\$79,636	\$0	\$3,640,680
65+	\$81,976	\$428,979	\$424,195	\$31,821	\$0	\$140,688	\$1,107,659
Total	\$856,847	\$1,874,365	\$3,604,653	\$445,940	\$1,837,654	\$208,894	\$8,828,353

Percentage of Assets by GoalMaker® Participation Portfolio - As of 3/31/2018



0.0%

average contribution rate (%) for active GoalMaker participants

Due to rounding, pie chart may not equal 100%

0.1 Years

average length of time GoalMaker participants have been enrolled in GoalMaker

3.3%

GoalMaker participation rate for those who actively elected GoalMaker

Assets and contributions reflect actual participant account balances and do not include outstanding loan balances, forfeitures, and / or expense account assets.

Customer should promptly report any inaccuracy or discrepancy to the brokerage firm(s).

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