Saving | Planning | Investing

TPX Platform Features

Participants access a feature rich website for account data and a wealth of information on financial planning.

Balances + Performance + Investments

Account balances by investment are displayed in user friendly graphical charts and tables listing investment name, shares and allocation percentages. To find out how their account is doing, participants can view a persoanlized rate of return for their investment portfolio.

With just a few quick clicks, participants can manage the direction of their investments, including elections for ongoing contributions, exchanges between investment options, and realignment and rebalancing of current portfolio allocations.

Statements

Participants can easily generate an account report with variable date ranges on demand. In addition, the custodian will automatically send a quarterly statement to each participant's address of record.

Account History

Knowing the transactional history of their account is an important right of any participant. Within the "reports" module the history function provides access to all transactions by date, investment, and transaction type.

Education Center

To meet the ongoing educational needs of participants, the Participant platform has a built-in Education Center to help participants with investing and saving for their retirement. The Education Center contains:

- Articles on the fundamentals of investing
- Guides to understanding retirement accounts
- Market and fund research, quotes and charts
- Suite of interactive calculators
- FAQs and Glossary of terms
- Videos

Communications Plan Library + Help Desk

Operational forms and important plan documents can be archived in the Library section of the plan. Participants have quick and easy access to view and download any relevant plan forms, notices, disclosures and application forms of the plan.

Participants seeking assistance with the website, administrative or investment-related questions can access the help desk feature.