Partner with Putnam to enhance your business-building efforts with plan sponsors

1 Prospect for new clients with the advantages of PlanPro

- Plan does not offer auto enrollment
- Plan issued a corrective distribution of $18,651
- Participant loans summing to $262,368
- Plan has insufficient fidelity bond coverage. Coverage equals 2.2% of plan assets
- Non-404(c) compliant plan
- Plan does not offer a QDIA (Qualified Default Investment Alternative)
- Low plan investment rate of return. Rate of Return was -6.92%, relative to a -5.37% national average

Our DCIO team has access to PlanPro, an analytical prospecting tool that can search more than 1.5 million corporate retirement plans to identify new plan prospects.

This tool provides access to information gathered from Form 5500 plan filings. In addition to showing plan assets, it can pinpoint potential plan design weaknesses that provide opportunities to engage with decision makers.

Our DC Investment Specialists can help you identify opportunities and deliver a customized, target list of prospects with the data from this tool.

2 Network with plan decision makers using LinkedIn

To make your prospecting efforts as efficient and productive as possible, our DCIO team can apply Linkedin strategies to your target lists.

As a leader in helping advisors leverage social media, Putnam offers a playbook with helpful guidance on improving your overall use of social tools along with targeted training and best practices for LinkedIn.

Working with the lists generated by PlanPro, our DC Investment Specialists can help you use LinkedIn to analyze existing relationships and network with key decision makers within a given plan.

3 Consult with plan sponsors by putting retirement plan design in a whole new light

Using PlanVisualizer™, our DCIO Investment Specialists can help you show an HR team, CFO, or CEO how basic changes in plan design can influence participant outcomes and overall plan costs.

PlanVisualizer analyzes and scores how well a plan is helping participants prepare for retirement. The tool identifies gaps in retirement readiness for participants in the plan and models solutions to improve outcomes and reduce potential plan costs.

Our team can coach you on using the information and insights from PlanVisualizer and shift you into a consultative role with current clients or new prospects. You can address key questions involving plan design and the effects on cost and participant outcomes.

DCIO Territory Sales Map

For general inquiries, please call 1-866-4PUTNAM (1-866-478-8626)

Steven McKay
Head of DCIO
617-760-4838

Angela Achatz
Director of DCIO
Strategic Relationships
913-956-1013

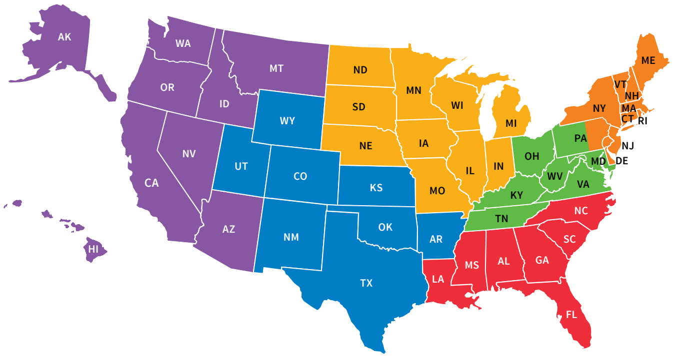
Stacy Zenger
Senior DCIO Key
Account Manager
913-951-1485

Rob Glass
DCIO Key Account Manager
617-760-8083

Meghan Whelan
DCIO Consultant
Relations Manager
617-760-2138

Dana McManus
DCIO Consultant
Relations Associate
617-760-5312

Patrick Scanlon
DCIO Key Account Manager
617-760-5615



DCIO SALES DESK MANAGER	**Briana Anderson**	978-974-3186 Briana_Anderson@putnam.com
INTERNAL SUPPORT FOR ALL TERRITORIES	**JP Rehak** DCIO Sales Associate	978-974-3185 JP_Rehak@putnam.com

TERRITORY	DC INVESTMENT SPECIALIST		INTERNAL SUPPORT
North East Region	**Devin Russell**	617-275-6699 Devin_Russell@putnam.com	**Christopher Speer** 978-974-3183 Christopher_Speer@putnam.com
Mid-Atlantic/Ohio Valley Region	**Mike Dullaghan**	540-354-3638 Michael_Dullaghan@putnam.com	
Upper Mid-West Region	**Dan Florina**	224-374-8419 Daniel_Florina@putnam.com	**Briana Anderson** 978-974-3186 Briana_Anderson@putnam.com
West Region	**Mike Foy**	714-222-3583 Michael_Foy@putnam.com	**Chris Yuan** 978-974-3184 Chris_Yuan@putnam.com
South Central Region	**Ryan Griffin**	512-230-4001 Ryan_Griffin@putnam.com	**Mike Andrulis** 978-974-3182 Michael_Andrulis@putnam.com
Southeast Region	**Mike Rock**	704 838-6407 Michael_Rock@putnam.com	

Dedicated to your success

Putnam's DCIO team can help you in every key step of client interaction, from prospecting to networking to consulting. Our Defined Contribution Investment Specialists work with Internal Investment Specialists to provide you with industry-leading service and help to enhance the value of all the service you give to clients. We provide comprehensive ongoing support.

To reach your DCIO team, call 1-866-4PUTNAM (1-866-478-8626) or visit putnam.com/dcio/contacts.