

2011 PLANSPONSOR DC Survey Honors

RETIREMENT & BENEFIT PLAN SERVICES

Bank of America Merrill Lynch receives

30
**“BEST IN CLASS”
HONORS**

EARNED “BEST IN CLASS” HONORS IN 23 CATEGORIES

Participant Services

- Beneficiary administration
- Communication materials
- Education program
- Enrollment assistance
- Loan/withdrawal processing
- Online tools/services
- Onsite meetings
- Participant call center
- Range of investments
- Retiree services
- Website functionality
- Compliance support
- Legislative update

Sponsor Services

- Account team knowledge
- Fee “cost-to-value”
- Form 5500 processing
- Plan design flexibility
- Plan reports/benchmarking
- Service responsiveness
- Sponsor website/tools
- Staff consistency
- Participant fee disclosure
- Participant statements

**95.2%¹ of
Plan Sponsors
are Likely to
Recommend**

For more information about Bank of America Merrill Lynch’s full suite of retirement and benefit plan services, call us toll free at **1.888.550.7705** or visit www.baml.com/integratedbenefits

¹ 95.2% represents a combined survey result percentage of client recommendation likelihood of 72.5% “Extremely likely” and 22.7% “Moderately/slightly”

Ratings were based on results from 6,885 plan sponsors that replied to the 2011 PLANSPONSOR DC Survey questionnaire. 47 plan providers obtained the minimum required 35 survey responses to be considered for awards. “Best in Class” awards are given to qualified providers with average scores in the top quartile for each individual category, across both participant and sponsor services, within each plan asset size: Micro (under \$5 million); Small (\$5-50 million); Mid (\$50-200 million); Large (\$200 million-\$1 billion); and Mega (over \$1 billion). For additional details, please refer to the November 2011 issue of PLANSPONSOR Magazine or go to www.plansponsor.com.

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Investment products:

Are Not FDIC Insured	Are Not Bank Guaranteed	May Lose Value
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