

As BPAS serves our plan sponsor and financial intermediary clients, we receive periodic requests to mail certain communications to participants that are outside the scope of our customary services and fee schedule, including things like:

- A fund change memo or other fund literature
- Safe harbor or QDIA Notices
- A targeted communication piece to participants (e.g., those with no investment elections or who are deferring < 3% of pay, etc.)
- An SPD, SMM, or SAR
- The 404a-5 annual fee disclosure notice
- Enrollment kits or enrollment literature
- Proxies or other information regarding company stock
- Employee surveys

While mailing services may be performed by the plan sponsor or financial intermediary directly using the complete set of participant data we provide in the BPAS Plan Portal, in the BPAS Plan Portal (see the Action Items Tab in the Resource Center, then the Participant Details spreadsheet), we recognize that some clients prefer that BPAS handle certain mailings on a fee for service basis. Please note that our fee schedule encompasses many services (data manipulation and merging, printing, the cost of paper and envelopes, folding, insertion, envelope sealing, etc.).

### BPAS Mailing Services Fees

Mailing fees include 6 x 9 window envelopes, paper, printing, folding, insertion, envelope sealing, and delivery to the U.S. Post Office. We print all mailings double sided to help reduce postage costs. You may request single-sided printing at no additional cost other than postage. Postage expenses are passed on directly at cost.

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| Handling and set-up fee (including planning, set-up, data merge, communicating with client, etc.) | \$160 per order                                |
| Orders with less than 1,000 envelopes   | \$0.40 per printed side of page                |
| Orders in excess of 1,000 envelopes:  | \$0.30 per printed side of page (entire order) |

You may choose to be invoiced for mailing services or pay the fees from plan assets as a plan-related education and communication expense.

**Note:** A custom fee quote may be necessary in the case of an unusually large or complex order, an order that requires complex manipulation or scrubbing of data, or an order that involves significant printing or materials cost.

For our mailing services request form, please visit: <http://toolbox.bpas.com/mailingservices>

BPAS understands that Department of Labor rules require extensive hard copy delivery of certain communications. We continue to advocate for greater DOL acceptance of electronic delivery to reflect the modern realities of today's workplace, and encourage our clients to do the same. (You may submit comments at [www.dol.gov/ebsa](http://www.dol.gov/ebsa)). In the meantime, we stand ready to assist clients in ad-hoc mailing requests as needed.