



1. A CFO of a large corporation needs to conduct a monthly review on how the funds within the 3 plans they have with SAMPLE COMPANY are performing. He wants to print out the information and keep it in a folder for future reference.
2. The next day, the same CFO receives word he needs to create presentation materials for a meeting with the Head of Finance on the plans' quarterly performance. He will go into PSW and find the monthly performance data for all funds.

Next he will save the information as a CSV file so he can later convert it to Excel.

Once in Excel the CFO will present the data in a chart form for his presentation.
3. A Plan Administrator has a recently hired participant in their office. This participant lost the performance sheets that were provided to them in their enrollment package. The participant has expressed interest in the Small Cap Growth Fund, Diversified Fund, and the Freedom Fund 2030.

The administrator will go to PSW and print the plan's performance sheets by saving the output as a PDF file and give it to the participant in a user friendly format.
4. A treasurer of a not for profit higher education institute is provided the Master Recordkeeper service from SAMPLE COMPANY.

They need to find the performance information for a fixed annuity and a variable annuity that are offered to the participant through TIAA-Cref.

The treasurer will need to print a detailed report just on the outside holding performance data, but then also provide a detailed performance report on all of the funds in the plan relationship cross multiple vendors that are recordkept by SAMPLE COMPANY.
5. A benefits administrator receives a call from a participant questioning how many shares were purchased in their last contribution.

The BA will go to PSW to find the price of their 3 funds on the date that the contribution posted to confirm the shares are accurate.
6. A CFO of a mid level Core client needs to quickly find what all of the indices are doing today. She goes to PSW to find a quick display of how the DJIA and the S&P500 are doing today.
7. A Benefits Administrator without much investment knowledge in the small market needs to collect investment data to present to the President of their company. She needs to be able to present a report of quarterly performance data on all of their funds, in addition to the Top Ten Holdings of each fund at the end of the quarter.
8. A newly hired Treasurer is assessing which funds have not outperformed the S&P500 within their plans to present a new investment strategy.

He goes to the invest area to see the list of funds offered, what their year to date performance is, and is able to drill down into a specific fund detail to see how the fund has done compared to its index.
9. A Treasurer needs to analyze (trend) quotes for the past year for the SAMPLE COMPANY Contra Fund. He wants to export quote information for a presentation to his committee.
10. A Treasurer needs to analyze price quotes for all funds within a given plan for a historical date (i.e. quarter end from two quarters ago, month end from seven months ago) and download to a CSV to be able to compare to the current day prices for the plans' funds.
11. A participant would like performance information for all funds within the plan as of the most recent quarter end with a view of some common indices. Plan Administrator would like to produce in PDF format.
12. A Plan Sponsor / Investment Professional would like month-end performance information on all SAMPLE COMPANY Mutual Funds available in PDF format.
13. A Plan Sponsor / Investment Professional would like quarter-end performance information for all FundsNet funds available in PDF format.