

**South Carolina Deferred Compensation Program
2023 Field Service Performance Standards**

The field service performance standards will be agreed upon by Empower and the South Carolina Public Employee Benefit Authority and will be measured on a calendar-year basis. A fee of up to \$3,000 will be paid to the Unallocated Plan Assets account for non-performance. Allocation among the goals is provided below.

Goal #1: At least 300 Retirement Awareness Reviews (RARs) per Retirement Plan Advisor (RPA).

Non-Performance Fee: \$750.00

Goal #2: Positive participant actions at a rate of 35% or greater per RPA based on participant meetings. Positive outcomes include deferral increases, diversification of investments (including choosing a TDF or Managed Accounts (MA)), rollovers in of outside retirement plan assets, MA servicing or enrollment in the plan.

Non-Performance Fee: \$750.00

Goal #3: Net Promoter Score (NPS) of 70 or above for each RPA. The NPS is an index ranging from -100 to 100 that measures a participant's willingness to recommend a company's products or services to others. In this case, it is used to gauge the participant's overall satisfaction with the service provided by the RPA.

Non-Performance Fee: \$750.00

Goal #4: Rollovers in of outside assets for at least 25 participants per RPA.

Non-Performance Fee: \$500.00

Goal #5: Each RPA will service existing Managed Account (MA) participants to equal at least \$5 million in total participant assets serviced. MA servicing includes working with participants enrolled in the managed account service to ensure their profile is as complete and accurate as possible to allow the service to provide the best result possible.

Non-Performance Fee: \$250.00