

# **ENROLLMENT REPORTS**

Prepared  
for

**Sample Client**

**Executive Deferred Compensation Plan**

**2024 Enrollment**

Prepared  
by

**The Pangburn Group**

March 08, 2024

## Table of Contents

### Report

### Page Number

#### **Plan Sponsor Enrollment Reports:**

Enrollment Status 1

Deferral Elections 2

#### **Participant Reports:**

Participant Enrollment Summary 3

EMPLOYER: Sample Client  
 PLAN: Executive Deferred Compensation Plan  
 REPORT: Online Enrollment Status Report for 2024 Enrollment  
 ENROLLMENT PERIOD: 01/01/2023 through 06/30/2025

<u>Eligible Participants</u>	<u>Source</u>	<u>Status</u>	<u>Last Modified Date on Enrollment Site</u>	<u>Last Logged In to Participant Site</u>
Doe, Chris	Paper Forms	Completed	03/08/2024 01:05 pm	08/28/2019 11:18 am
Johnson, Carl	Evergreen	Completed	03/08/2024 01:06 pm	08/08/2017 10:22 pm
Johnson, Matt	Paper Forms	Completed	03/08/2024 01:05 pm	08/08/2017 10:23 pm
Jones, Bob	Evergreen	Completed	03/08/2024 01:06 pm	11/27/2017 11:21 am
Jones, Jessica				03/08/2024 12:49 pm
Smith, John	Online	Completed	02/23/2024 11:33 am	03/07/2024 09:12 am

**SUMMARY:**

Eligible Employees	<b>6</b>	
<b><u>Status</u></b>	<b><u># of Eligible Participants</u></b>	<b><u>Percentage</u></b>
Completed	5	83.33%
Incomplete	0	0.00%
Did not enroll	1	16.67%

EMPLOYER: Sample Client  
 PLAN: Executive Deferred Compensation Plan  
 REPORT: Deferral Elections - 2024 Enrollment  
 ENROLLMENT PERIOD: 01/01/2023 through 06/30/2025

<u>Eligible Participants</u>	<u>Deferral (\$ / %)</u>	<u>\$ Cap</u>
<i>Doe, Chris</i>		
Bonus Deferrals	No Deferral	
Commission Deferrals	\$8,000.00	
Employer Matching Contributions	Eligible	
Salary Deferrals	No Deferral	
<i>Johnson, Carl</i>		
Bonus Deferrals	No Deferral	
Commission Deferrals	No Deferral	
Employer Matching Contributions	No Deferral	
Salary Deferrals	No Deferral	
<i>Johnson, Matt</i>		
Bonus Deferrals	No Deferral	
Commission Deferrals	No Deferral	
Employer Matching Contributions	No Deferral	
Salary Deferrals	No Deferral	
<i>Jones, Bob</i>		
Bonus Deferrals	10.00 %	
Employer Matching Contributions	Eligible	
Salary Deferrals	\$6,000.00	
<i>Smith, John</i>		
Bonus Deferrals	\$100,000.00	
Commission Deferrals	No Deferral	
Employer Matching Contributions	Eligible	
Salary Deferrals	5.00 %	

*NOTE: If any participant elections above apply to a bonus (annual, fiscal year, performance-based or otherwise) paid for services performed after the election, the election applies to no more than the total amount of the bonus compensation for the performance period multiplied by the ratio of the number of days remaining in the performance period after this election over the total number of days in the performance period.*

EMPLOYER: Sample Client  
 PLAN: Executive Deferred Compensation Plan  
 REPORT: Participant Enrollment Summary - 2024 Enrollment  
 ENROLLMENT PERIOD: 01/01/2023 through 06/30/2025

Participant Name: **Doe, Chris**

Please review the following summary for accuracy of your elections to the Deferred Compensation Plan. If there are any discrepancies in your understanding of your enrollment, please notify your Plan Sponsor immediately.

<i>Deferral Elections</i>
---------------------------

<u>Compensation</u>	<u>Elections</u>	<u>\$ Cap</u>
Bonus Deferrals	No Deferral	
Commission Deferrals	\$8,000.00	
Employer Matching Contributions	Eligible	
Salary Deferrals	No Deferral	

<i>Account Allocations</i>
----------------------------

<u>Compensation</u>	<u>Account</u>	<u>%</u>
Commission Deferrals	Scheduled Withdrawal Account - 5	100.00
Employer Matching Contributions	Employer Match Account	100.00

---

EMPLOYER: Sample Client  
PLAN: Executive Deferred Compensation Plan  
REPORT: Participant Enrollment Summary - 2024 Enrollment  
ENROLLMENT PERIOD: 01/01/2023 through 06/30/2025

---

*Participant Name:* **Johnson, Carl**

Please review the following summary for accuracy of your elections to the Deferred Compensation Plan. If there are any discrepancies in your understanding of your enrollment, please notify your Plan Sponsor immediately.

<i>Deferral Elections</i>
---------------------------

<b><u>Compensation</u></b>	<b><u>Elections</u></b>	<b><u>\$ Cap</u></b>
Bonus Deferrals	No Deferral	
Commission Deferrals	No Deferral	
Employer Matching Contributions	No Deferral	
Salary Deferrals	No Deferral	

---

EMPLOYER: Sample Client  
PLAN: Executive Deferred Compensation Plan  
REPORT: Participant Enrollment Summary - 2024 Enrollment  
ENROLLMENT PERIOD: 01/01/2023 through 06/30/2025

---

*Participant Name:* **Johnson, Matt**

Please review the following summary for accuracy of your elections to the Deferred Compensation Plan. If there are any discrepancies in your understanding of your enrollment, please notify your Plan Sponsor immediately.

<i>Deferral Elections</i>
---------------------------

<u>Compensation</u>	<u>Elections</u>	<u>\$ Cap</u>
Bonus Deferrals	No Deferral	
Commission Deferrals	No Deferral	
Employer Matching Contributions	No Deferral	
Salary Deferrals	No Deferral	

EMPLOYER: Sample Client  
 PLAN: Executive Deferred Compensation Plan  
 REPORT: Participant Enrollment Summary - 2024 Enrollment  
 ENROLLMENT PERIOD: 01/01/2023 through 06/30/2025

Participant Name: **Jones, Bob**

Please review the following summary for accuracy of your elections to the Deferred Compensation Plan. If there are any discrepancies in your understanding of your enrollment, please notify your Plan Sponsor immediately.

Deferral Elections

<u>Compensation</u>	<u>Elections</u>	<u>\$ Cap</u>
Bonus Deferrals	10.00 %	
Employer Matching Contributions	Eligible	
Salary Deferrals	\$6,000.00	

Account Allocations

<u>Compensation</u>	<u>Account</u>	<u>%</u>
Bonus Deferrals	Scheduled Withdrawal Account - 3	100.00
Employer Matching Contributions	Employer Match Account	100.00
Salary Deferrals	Employee Deferral Account	100.00



EMPLOYER: Sample Client  
 PLAN: Executive Deferred Compensation Plan  
 REPORT: Participant Enrollment Summary - 2024 Enrollment  
 ENROLLMENT PERIOD: 01/01/2023 through 06/30/2025

Participant Name: **Smith, John**

Please review the following summary for accuracy of your elections to the Deferred Compensation Plan. If there are any discrepancies in your understanding of your enrollment, please notify your Plan Sponsor immediately.

Deferral Elections

<u>Compensation</u>	<u>Elections</u>	<u>\$ Cap</u>
Bonus Deferrals	\$100,000.00	
Commission Deferrals	No Deferral	
Employer Matching Contributions	Eligible	
Salary Deferrals	5.00 %	

Account Allocations

<u>Compensation</u>	<u>Account</u>	<u>%</u>
Bonus Deferrals	Scheduled Withdrawal Account - 1	25.00
Bonus Deferrals	Scheduled Withdrawal Account - 3	25.00
Bonus Deferrals	Scheduled Withdrawal Account - 4	25.00
Bonus Deferrals	Scheduled Withdrawal Account - 5	25.00
Employer Matching Contributions	Employer Match Account	100.00
Salary Deferrals	Employee Deferral Account	100.00