



Conference Forum—April 2019



Wespath

BENEFITS | INVESTMENTS

BAP Administration and Customer Service Update

Customer Service Update



**Paper Checks
Elimination**



**IIP
Withdrawals**



**Moving
Expenses**



**Phone Call
Security**



BAP



**Pin
Replacement**

Customer Service Update



Paper Checks Elimination

- Reduced from 2,200 to 300 in 2018
- Surviving spouse process



IIP
Withdrawals



Moving
Expenses



Phone Call
Security



BAP

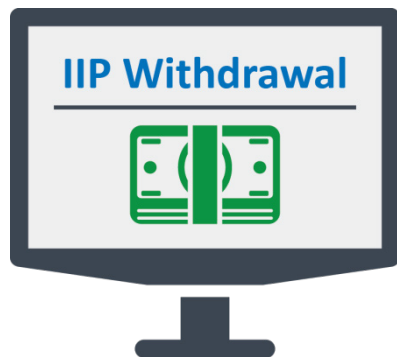


Pin
Replacement

Customer Service Update



Paper Checks
Elimination



IIP Withdrawals

- Require online withdrawals



Moving
Expenses



Phone Call
Security



BAP



Pin
Replacement

Customer Service Update



Paper Checks
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IIP
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Moving Expenses



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BAP



Pin
Replacement

- BAP functionality as of November 2018
- 50 conference provided data
- 1,782 participant records updated

Customer Service Update



Paper Checks
Elimination



IIP
Withdrawals



Moving
Expenses



Phone Call Security

- Industry-leading vendor for secure verification
- More personalized



BAP



Pin
Replacement

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BAP



Pin
Replacement

- Systematic information about death benefit
- Viewable under plan enrollment
- Fully implemented by June

Death Benefit Eligibility

Plan Enrollments ⚙️ Action ▾ 🔄 Refresh

Current Plan Enrollments

COMPREHENSIVE PROTECTION PLAN

RETIREE DEATH BENEFIT	ELIGIBLE	07/01/1995
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Plan Enrollments ⚙️ Action ▾ 🔄 Refresh

Current Plan Enrollments

COMPREHENSIVE PROTECTION PLAN

RETIREE DEATH BENEFIT	INELIGIBLE: RETIRED UNDER THE AGE OF 62; LESS THAN 30 YEARS OF SERVICE	06/01/2009
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Death Benefit Eligibility

Plan Enrollments			Action	Refresh
Current Plan Enrollments				
COMPREHENSIVE PROTECTION PLAN				
RETIREE DEATH BENEFIT	RESEARCH NEEDED			07/01/2012

- Direct questions to your plan sponsor manager

Customer Service Update



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BAP



Pin Replacement

- Implemented January 2019
- 1,744 new users registered in 2019
- 53% increase over 2018



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