



PROCEDURE: Statement Narrative, Logo, and Stuffers

Review Date: AUG 2021

Overview and process for adding statement narrative. Logo or statement stuffer.

Narratives

Narratives Overview:

Narrative box A

- Appears at top of statement – first page.
- Can be up to two (2) lines of 90 characters each.
- Can be entered by Institution, Product, Group, or Division
 - Product codes are by affiliate and plan type.

Narrative box C

- Appears at the end of the statement following the “General Information” section, prior to performance returns.
- Can be one full page in length
- This space is intended to be reserved for plan level messages.
- Can be entered by Institution, Product, Group, or Division
 - Product codes are by affiliate and plan type.

Process for providing Narratives:

Narratives are available for Institution, Product, Group or Division.

Note: If a narrative is meant for global MetLife communication, it must be reviewed and approved by the appropriate MetLife Management staff prior to submission.

- MetLife AE will complete the Statement Narrative Request form.
- MetLife AE must submit completed requests to Anush Sarkisyan (adjaniants@metlife.com) in the Met Marketing department for final review and approval.
- Once approved the request must be routed to the MetHome Plan Services team via Service Request for processing.
- Requests for narratives must be received in good order by MetHome at least 1 business day prior to month end of the month preceding the statement month.
 - Example – Request for a narrative for the 3/31/20xx statements must be to MetHome by 2/27/20xx.
 - Example – Request for a narrative for the 6/30/20xx statements must be to MetHome by 5/30/20xx.
 - Example – Request for a narrative for the 9/30/20xx statements must be to MetHome by 8/29/20xx.
 - Example – Request for a narrative for the 12/31/20xx statements must be to MetHome by 11/30/20xx.
- Request should include the length of time the narrative is to remain:
 - Specify if only for one quarter.
 - Or specify if it is to print indefinitely, until advised to remove.

Part 1 of form:

- Identify submission information.

Part 2 of the form:

- Provide plan listing. Identify the period of time the narrative should be in place for. Provide narrative location and any additional comments.

Part 3 of form:

- Provide the body of text to display in the appropriate narrative location.



Statement Stuffers

Process for providing statement stuffers:

- MetLife AE will complete the Statement Stuffer Request form
- MetLife AE must submit the completed request to Anush Sarkisyan (adjanians@metlife.com) in the Met Marketing department for final review and approval.
- Once approved the completed request must be routed to MetHome via Service Request for processing
- The Statement Stuffer Request form must be received in good order by MetHome at least 1 business day prior to month end of the month preceding the statement quarter.
 - Example – Request for a statement stuffer for the 3/31/20xx statements must be to MetHome by 2/27/20xx.
 - Example – Request for a statement stuffer for the 6/30/20xx statements must be to MetHome by 5/30/20xx.
 - Example – Request for a statement stuffer for the 9/30/20xx statements must be to MetHome by 8/29/20xx.
 - Example – Request for a statement stuffer for the 12/31/20xx statements must be to MetHome by 11/30/20xx.
- A PDF file of the stuffer should be forwarded to MetHome as soon as the final version is available, but no later than 5 business days prior to quarter end in which the stuffers are being mailed.
 - E-mail the file to steam@retirementpartner.com with a copy to MetHome@retirementpartner.com with the following information:
 - a. Name of the Stuffer
 - b. Plan Number(s)
 - c. Plan Name(s)
 - d. Period Included (i.e. 9/30, 10/31, 11/30)

NOTE: the PDF file is provided to the Client Services team so they are aware of what stuffers have been included in statements.

NOTE: the PDF file will be loaded to the Electronic File Cabinet for participants that have elected to receive their statements electronically.

Stuffer Timing recap:

- Statement Stuffer Request form – received in good order at least one business day prior to month end of month preceding the statement quarter.
- PDF file of the stuffer – received at least 5 business days prior to quarter end in which the stuffer is mailed.

Statement Stuffer Criteria:

Stuffers must meet the Statement Stuffer requirements – the key to remember is that this is automated – the stuffing is not done manually. **See below document for requirements.**

Statement Team

Stuffer Requirements

REV. 3/2019

Any stuffers that will be included in multiple plans must be reviewed and approved by the appropriate MetLife Management parties for submission.

- Stuffers must be delivered by the last business day of the month prior to quarter end.
 - Example – Stuffers are due on March 29 for the March quarter end statements.
 - Example – Stuffers are due on June 28 for the June quarter end statements.
 - Example – Stuffers are due on September 27 for the September quarter end statements.
 - Example – Stuffers are due on December 27 for the December quarter end statements.
- MetLife may include the participant newsletter as a stuffer in all statements. This must be confirmed prior to delivery each quarter.



Logo

Special Features and Options

- A Company may choose to place their logo on the statement.
- Generally, this is established during conversion.
- The logo appears in the top right of the participant statement on the first page.
- If used as a footer, appears bottom center of first page of the statement
- If this decision to use the logo is made after conversion, the request to add the logo must be made 30 days prior to quarter end.
- The Account Executive should submit the request to the MetHome Team, providing the following:
 - Camera Ready Art or TIF file or BMP file
 - Header: 1 ½" X 1 ½"
 - Footer: ¾" X 5"
 - Black and white – no shading

Participant statements can be summary or detail:

- This is established at conversion.
- Any subsequent change must be requested 30 days prior to quarter end.
- The Account Executive should submit the request to the MetHome team.