

# Data Provision Requirements

Please note: To ensure comparability and consistency of results, we expect that all sample provided is **random and representative of your fund** notwithstanding the below criteria of **Member Age** and **Employer Number of Employees**

Member Surveys	Employer Surveys
<p><u>1. Telephone survey – recent interaction with fund</u></p> <p>Minimum 1600 valid member contacts per survey wave, based on standard sample size of 200 member surveys.</p> <p><u>2. Online survey – recent interaction with fund</u></p> <p>Unlimited valid member contacts.</p> <p><u>3. Online survey – All Members</u></p> <p>Unlimited valid member contacts, with or without recent contact with the fund.</p>	<p><u>1. Telephone survey – recent interaction with fund</u></p> <p>Minimum 800 valid employer contacts per survey wave, based on standard sample size of 100 employer surveys.</p> <p><u>2. Online survey – recent interaction with fund</u></p> <p>Unlimited valid employer contacts.</p>
<ul style="list-style-type: none"> <li>→ Sample must include 50% of contacts aged 18-54 and 50% aged 55 or over. The exact age of the member is also required.</li> <li>→ <b>Note</b> – for privacy reasons please <u>do not provide members’ actual date of birth or members’ fund balance</u> in the sample file.</li> <li>→ Each contact requires at least member’s first and last name, gender, valid phone number with area code, email address, state, member ID (or other unique ID) and age.</li> <li>→ Members provided for survey 1 and 2 should have had recent contact with the fund within the past six months – this can be by phone, email, live chat or face to face meetings/workshops, to reflect the variety of touchpoints.</li> <li>→ Members provided for survey 3 represents any member with or without recent contact with the fund.</li> <li>→ If relevant, you can also provide Investment Mix (Default/Custom) and/or Time in Fund (0-4 years/5+ years) – please ensure you provide a representative distribution of these in your contact list.</li> </ul>	<ul style="list-style-type: none"> <li>→ Sample must include the following breakdowns of the number of employees the employer is contributing to your fund for: <ul style="list-style-type: none"> <li>▪ 25% → 0-4 employees</li> <li>▪ 25% → 5-10 employees</li> <li>▪ 25% → 11-50 employees</li> <li>▪ 25% → 51+ employees</li> </ul> </li> <li>→ Each contact requires at least the employer's first and last name, position, company name, valid phone number with area code, email address, state, Employer ID (or other unique ID) and number of employees contributing for.</li> <li>→ Employers provided for survey 1 and 2 should have had recent contact with the fund within the past six months – this can be by phone, email, live chat or face to face meetings/workshops, to reflect the variety of touchpoints.</li> </ul>
<p>Additional sample, extra questions or reporting by other variables that are included in the Member sample list may be requested at an additional cost.</p>	<p>Additional sample, extra questions or reporting by other variables that are included in the Employer sample list may be requested at an additional cost.</p>