

Plan Sponsor Review







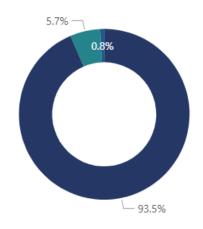
MissinSquare



Balance Summary September 30, 2025



\$215.3M
Participant Accounts
2,132



Plan

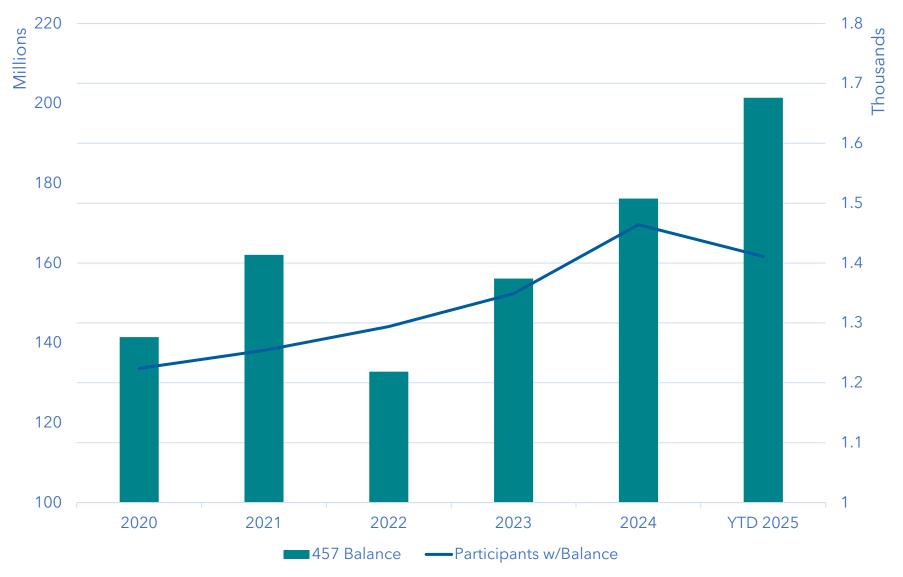
- ●457 (300149) CITY OF MADISON
- RHS (803160) CITY OF MADISON
- RHS (800034) CITY OF MADISON

Balance Summary Details

Plan	Participant Balance	Participant Accounts	Average Balance	Median Balance
457 (300149) CITY OF MADISON	\$201,383,450	1,524	\$132,141	\$47,532
RHS (800034) CITY OF MADISON	\$1,647,020	27	\$61,001	\$30,077
RHS (803160) CITY OF MADISON	\$12,249,763	581	\$21,084	\$20,208

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Asset & Participant Growth



457 Plan Employee Status September 30, 2025



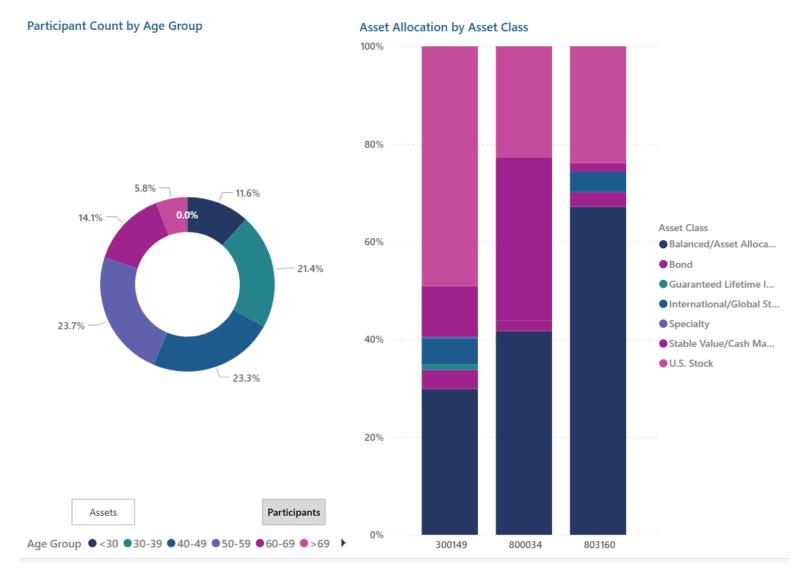
Participant Status as of 09/30/2025	Total Count	Total Balance
Active Contributing	1,001	\$101,106,624.09
Active Not Contributing	64	\$5,169,692.54
Separated from Service	459	\$95,107,134.07
TOTAL	1,524	\$201,383,450.70





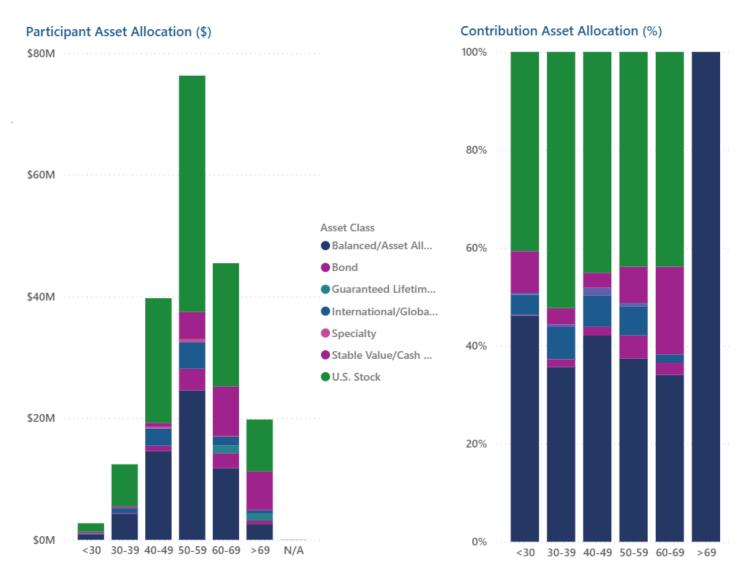
Plan Asset Allocation September 30, 2025





Participant Asset Allocation - 457 September 30, 2025





Service Usage All Plans September 30, 2025





2024 & YTD 9/30 Plan Education and Outreach

Education

50/39On-Site/Virtual Days

778/696

RPS Consultations

What Else?

Started offering virtual days during 2025.

Participation & Savings

146/108
Enrollments

14

Group Meetings avg of 20 individuals per session

Continued Retiree only outreach days

Adding phone consultation appointments on Madison's scheduling link throughout year

Financial Wellness

CFP® Onsite Visits

92/88
CFP® Consultations

\$2,100,000 ____Roll Ins____

Visited 41 different City locations to date

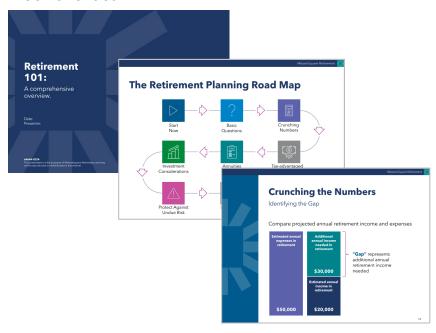
Retention

Financial Planning Program

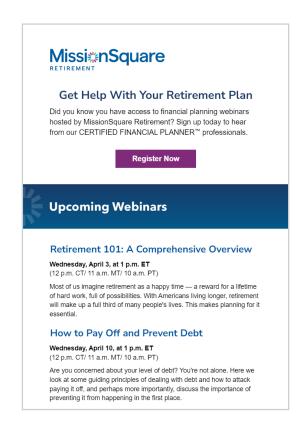
Missi**nSquare

2025 Webinar Program

Webinar Slides



View the full annual schedule: www.missionsq.org/cfpwebinars.



Services Provided by MissionSquare CFP® Professionals

	Financial Planning Education (For All)	Financial Planning (>\$100K in MSQ Assets)	Personal Planning (>\$1M in MSQ Assets)
Educational Webinars and Seminars	✓	✓	✓
Virtual Consultations With a CFP® Professional	✓	✓	✓
Communications on Relevant Financial Topics	✓	✓	✓
Social Security Analysis and Strategies	✓	✓	✓
Personalized Financial Goal Plan	*	✓	✓
Exclusive Educational Webinars			✓
A Dedicated CFP® Professional			√
Kiplinger Retirement Report			✓

Actions for Public Service Employers to Take



Prepare Your Plan for Roth Catch-Up Contributions

If your plan offers catch-up contributions, you'll need to amend your plan to include Roth age-based catch-up contributions before Jan. 1, 2026.

SECURE 2.0 requires this feature for employees making over \$145,000 per year.

Read the Guide



Questions?

