

From: [Kendrick, Jonathan A. - VP & Chief Human Resources Officer](#)
To: [Maillis, Patricia L. - Director, Employee Services](#)
Subject: RE: A Proposal for JEA Non-Qualified Plan
Date: Monday, November 18, 2019 9:42:04 AM
Attachments: [image002.png](#)
[image004.png](#)
[image005.png](#)
[image006.png](#)
[image007.png](#)

We should have a longer lead time when it's decided to proceed. And you're right – no longer needed right now. Thanks.

From: Maillis, Patricia L. - Director, Employee Services <mailpl@jea.com>
Sent: Monday, November 18, 2019 8:21 AM
To: Kendrick, Jonathan A. - VP & Chief Human Resources Officer <kendja@jea.com>
Subject: FW: A Proposal for JEA Non-Qualified Plan

Jon,

If there is an intent to roll this plan out in the future, e.g., 2021, we would prefer 6 mos get contract signed and set-up automated enrollment and administration.

NOTE: assuming we no longer need this at this time.

Pat

From: Scheetz, Michael <mscheetz@massmutual.com>
Sent: Friday, November 8, 2019 10:36 AM
To: Maillis, Patricia L. - Director, Employee Services <mailpl@jea.com>
Subject: FW: A Proposal for JEA Non-Qualified Plan

[External Email - Exercise caution. DO NOT open attachments or click links from unknown senders or unexpected email.]

Pat:

I am forwarding to your attention the proposal for the annual recordkeeping for the Non-Qualified Performance Unit Plan. Since we do not know the number of participants that will participate in the plan, we had to make some assumptions. We extracted from the database a list of employees with compensation over \$150,000 with the assumption this group of employees are the most likely to contribute. Based on that extraction we arrived at 37 participants for pricing purposes.

Let me know if you have any follow up questions.

JEA0675

Regards,

Michael M. Scheetz
Client Engagement Manager | Government Markets
Workplace Solutions

MassMutual

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From: Girard, Chad <CGirard@MassMutual.com>
Sent: Friday, November 08, 2019 10:19 AM
To: Scheetz, Michael <mscheetz@massmutual.com>
Subject: FW: A Proposal for JEA Non-Qualified Plan

Please let me know if you need anything else.

Chad Girard
Sales Consultant
Workplace Solutions & Strategic Distribution

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 **MassMutual**

**We are pleased to present the following
proposal for JEA Non-Qualified Plan.**

\$5,500 Annual Applicable Fee using S
shares

**This proposal is based on the following
information provided to MassMutual:**

JEA0676

For Profit/Top Hat Plan

\$0 Assets

\$370,000 Cash Flow

37 Participants

Thank you for considering MassMutual as your retirement plan solutions provider.

We can help drive better outcomes for your client's retirement plan and help their employees retire on their own terms.

We look forward to working with you on this opportunity. For more information or assistance, please contact:

John Dolan, Managing Director, at 413-426-6232

Chad Girard, Sales Consultant, at 860-562-1197



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