COMPLIANCE ADMINISTRATION & DAILY VALUATION RECORDKEEPING

America's Premier Full Service Retirement Plan Provider Since 1969

PROFESSIONAL | EXPERIENCED | ACCURATE | TIMELY

RPA

Retirement Planners & Administrators, Inc.

COMMITTED TO DELIVERING SOLID RETIREMENT PLAN SOLUTIONS FOR COMPANIES LIKE YOURS SINCE 1969

RPA has a distinguished reputation for cost-effective, accurate, and hassle-free retirement plan compliance administration and open-architecture daily valuation recordkeeping second to none.

WHAT MATTERS

Retirement plan sponsors want their expectations met or exceeded by their retirement plan provider.

It matters that their filings and reports are prepared timely and accurate. Plan Sponsors want friendly responsive service from a competent and knowledgeable plan provider.

They want flexibility and diversity in their investment alternatives. They do not want excuses. And, they want to know that they are getting quality support at a very competitive cost.

Here's what else matters...

EXPERIENCE MATTERS

For over 40 years RPA has built and maintained a distinguished reputation as a full-service retirement plan provider.

REPUTATION MATTERS

RPA has a solid unblemished business reputation and serves some of the most respected retirement plan clients in America.

COST MATTERS

Highest quality service performance and responsive support at very competitive fees and costs.

SERVICE MATTERS

You can count on our attentive, competent and friendly staff delivering prompt and courteous service to you.

RETENTION MATTERS

Our highly developed business model has rewarded us with one of the strongest percentages of client loyalty and retention in the business.

FLEXIBILITY MATTERS

Whether through our open-architecture recordkeeping system or through custom plan design services, we determine what you need and when you need it – and then deliver.

PARTNERSHIPS MATTER

RPA has formed strategic relationships with some of the most respected and notable complimentary service providers to provide clients with a comprehensive strategy to their retirement plan needs.

TALENT MATTERS

RPA employs a highly respected team of some of the most experienced and talented pension professionals in the retirement plan business. All employees are required to attend continuing education seminars and many have certifications through pension industry associations.

"Our success is measured by our ability to assist our clients in finding the most efficient way to meet their retirement plan objectives." — *Hans Banziger, President*

www.retirementplanners.com

PLAN COMPLIANCE ADMINISTRATION

Woven into the fabric of America's retirement plans, is a complicated labyrinth of rules, regulations and administrative procedures.

Any failure to conform fully with these regulations, whether by unintentional error or innocent oversight, can result in stiff governmental penalties and adverse tax consequences – something you should never have to worry about.

Our job, which we have been doing well for over 40 years, is to take the compliance administration burden away from you and ensure that your retirement plan is at all times in full compliance with the ever changing regulations and timely with all of your tax filings and reporting requirements.

DAILY VALUATION PARTICIPANT RECORDKEEPING

The need for accurate accounting and proper allocation of all monies in a retirement plan cannot be over emphasized.

Our sophisticated state-of-the-art pension plan software is designed to provide your plan with some of the most advanced high tech daily valuation participant recordkeeping available in the industry.

When interfaced with our industry leading strategic partner's Trading & Custody Platform, RPA clients and their plan participants have at their finger tips a full and accurate daily accounting of their accounts that can be managed with maximum user friendly flexibility.

CUSTOM PLAN DESIGN

Good plan design can serve to maximize the accumulation of retirement income benefits for your plan participants.

Your company, and it's strategy for executive benefits, make your retirement plan unique from many other plans. There is no reason for your retirement plan to settle for an off-the-shelf plan document. We have decades of experience in custom designing retirement plans based on the unique demographics, financial resources and the philosophies of your business – designed to maximize the value for both you the employer and your employees. Our expertise will show you how to maximize saving opportunities and find solid pre-tax and after tax advantages as well.

TRUE OPEN-ARCHITECTURE MUTUAL FUND AVAILABILITY

"Open-architecture" provides maximum investment selection flexibility and diversity for your plan.

The ability for the trustees and advisors of your retirement plan to select the precise investment line up that specifically meets the investment objectives of your plan from the widest universe of mutual funds, can be accomplished through a truly "open architecture" recordkeeping format. Mutual funds from hundreds of fund families in every possible asset class are available to your plan through the fully "open architecture system provided by RPA and its Trading & Custody strategic partners.

ASPPA® MEMBER
WORKING FOR AMERICA'S RETIREMENT

BBB

NIPA
National Institute of Pension Administrators
PROUD MEMBER

What's Your Plan?

RPA's service experience and knowledge extends across the entire spectrum of today's retirement plans. Whether you are starting a plan, or have a large established retirement plan program, we can support your needs:

401(k) Plans

Profit Sharing Plans

Cross-tested/New Comparability Plans

403(b) Plans

457 Government and Non-Profit Plans

Money Purchase Plans

Defined Benefit Plans

Cash Balance Plans

SCA/Davis Bacon Plans

Our Affiliate PayBridge™

Our affiliate is a national provider of integrated payroll services. PayBridge™ offers clients an enterprise-smart™ solution that integrates payroll with your retirement plan and a wide variety of business services.

Whether your business is small or large, the PayBridge™ user-friendly, web-based interface, and unparalleled customer support delivers payroll processing, tax filings, withholding tax, state and federal unemployment remittance – all fully integrated.

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