



JUBILEE

2024 NATIONAL CONFERENCE

20TH ANNIVERSARY



LEVERAGE SCALE

152,000
of Plans

\$1.6 Trillion AUI





**BUILT BY ADVISORS
FOR ADVISORS**

PRACTICE MANAGEMENT PLATFORM

- Training and Support
- Technology
- Leveraged Scale



GROWTH

TRAINING AND SUPPORT



Veronica Lee

Chief Relations Officer

TRAINING AND SUPPORT



8,000+ emails responded to



5,000+ phone calls



95% of ERISA questions
answered in 24 hours

TRAINING

Your advisory teams are growing...

WE ARE HERE TO HELP

RPAG UNIVERSITY

Our own management learning system

2-3-minute videos everything RPAG

CONFERENCES = COLLABORATION



Spring Summits



National Conference



Advisory Council



Partner Workshops



2025 RPAG SPRING SUMMITS

Chicago, Philadelphia, Dallas,
Charlotte, Aliso Viejo

New Partner Workshops: 1st, Capital Group, Los Angeles

TECHNOLOGY

RPAG INVESTMENT

\$45 Million



Seasoned
Technology Team



“Built by advisors
for advisors”



Enhanced Internal
Processes



Creating greater output
and extreme efficiencies



Worldwide
Partners





INITIATIVES

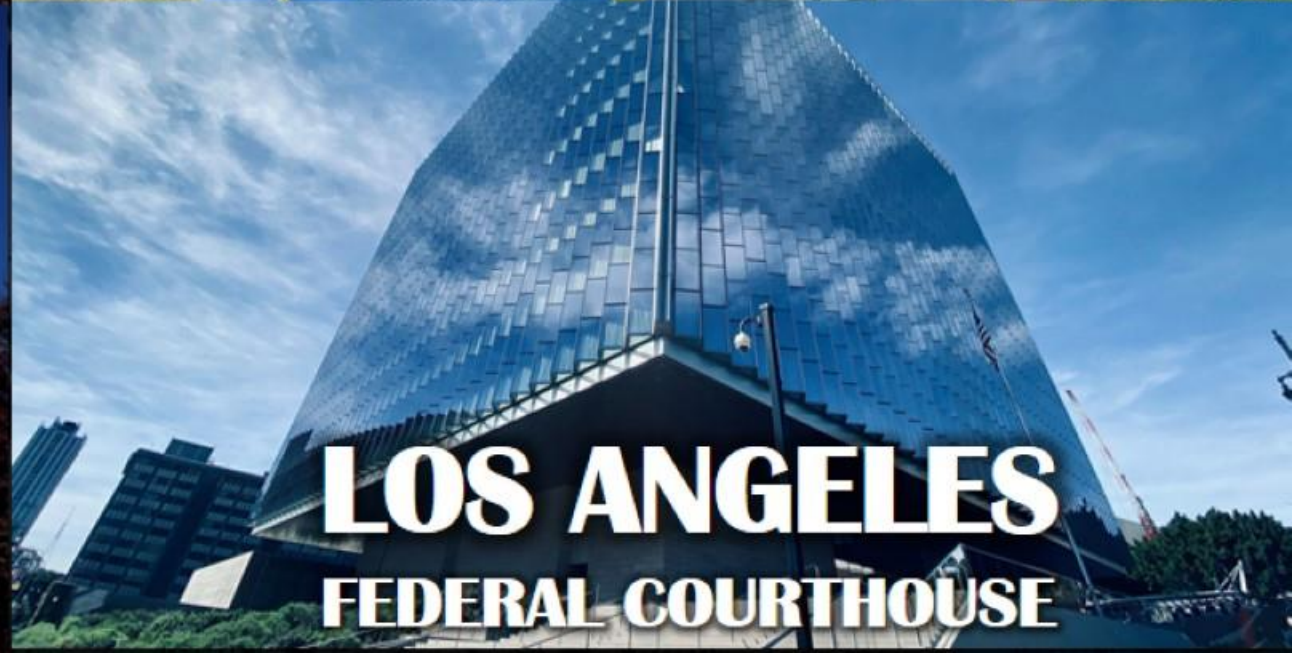
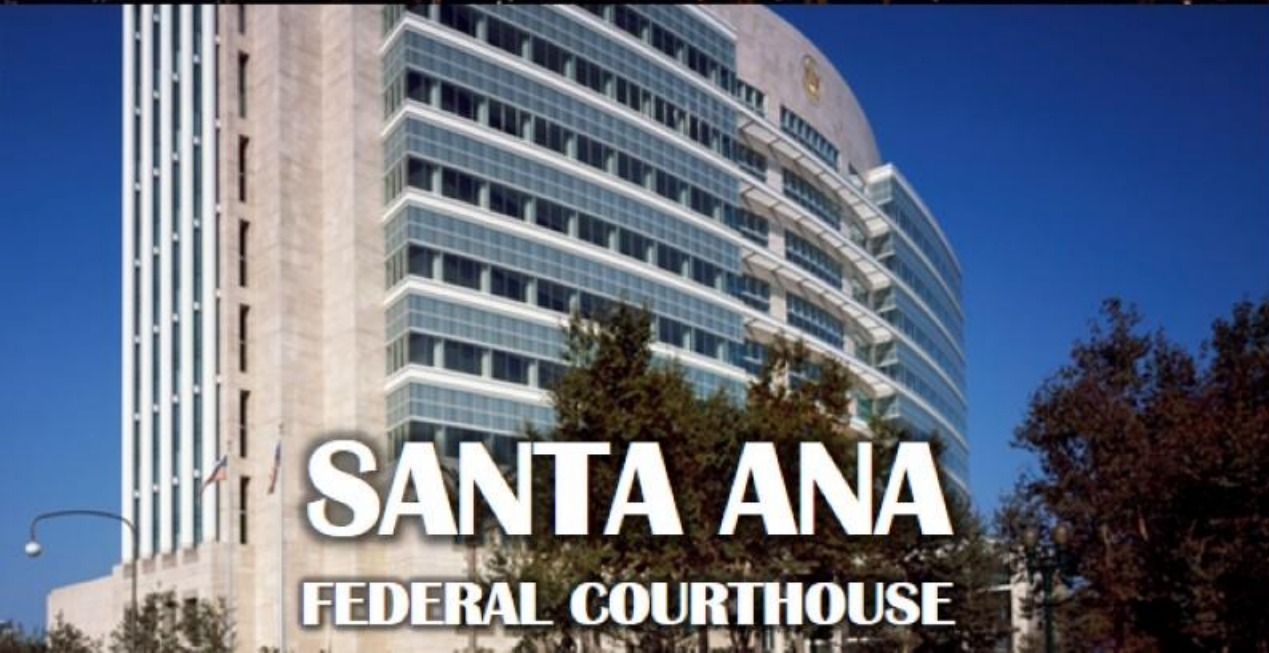
**Continue innovating
platform**

**Enhance member
relationships**

**Strengthen connectivity
with partners**



UPDATE



WE WON LAUDERDALE

MILLS - WON AT TRIAL

Plaintiffs have asked for reconsideration

**“The Fit Analysis was consistent
with DOL TDF Guidance”**

FIT ANALYSIS REFERENCED OVER 10 TIMES IN THE SUMMARY.

“flexPATH’s process involved, among other things, analyzing participant data of the merging plans, conducting the fit analysis to determine an appropriate glidepath risk level for QDIA...”

“...in selecting funds for a retirement plan, it is objectively reasonable for fiduciaries to select a fund that among its other attributes, is expected to reduce risk of severe loss in down markets.”

“Where a business has competed fairly and ethically, it cannot be faulted for succeeding.”

THANK YOU



**SEAN
MURPHY**



**MATT
LAROCHÉ**



**CATALINA
VERGARA**

22,488

PLANS USE ONE OF YOUR CITS

TOTAL CIT GROWTH

(IN BILLIONS)



INVESTMENT COUNCIL

INVESTMENT COUNCIL LEADERSHIP



Jeff Elvander
CIO



Matt Giovinazzo
Dir. Investment
Management



Kellen Foley
Dir. Investment
Management

INCOME

MANAGED
ACCOUNTS

MORE

INCOME



MANAGED ACCOUNTS

flexPATH 3(38)



Marketing Agreement



Disclosure



Revenue

NEW 2024 CIT OFFERINGS



	Small Cap Growth III (Voya Small Cap Growth)	Mid Cap Value II (Allspring Special MCV)	Emerging Markets II (BlackRock Emerging Mkts)	Core Plus Bond III (Fidelity Total Bond)
Score	9	10	10	10
Expense	0.58%	0.45%	0.62%	0.25%
Savings	31%	36%	29%	17%

CIT GROWTH ON THE HORIZON



	Stable Value II (Principal)	US REIT (Principal)	American Funds Washington Mutual	American Funds High-Income Trust
Score	-	10	7	10
Expense	0.10%	0.52%	TBD	TBD
Savings	70%	36%	-	-

Strategy Equivalent Score

TDF CIT GROWTH ON THE HORIZON



	American Funds TDF Series	RetirePilot Fidelity Blend	Putnam Retirement Advantage Income	SmartGoal by J.P. Morgan
Score	9	-	-	-
Expense	0.30%	TBD	0.35%	0.16%
Savings	9%	-	-	-

 **flexPATH**[®] TDFs
STRATEGIES

 **flexPATH Index** and  **flexPATH Index+**
POWERED BY flexPATH[®] POWERED BY flexPATH[®]

flexPATH[®] STRATEGIES TDFs

 flexPATH Index POWERED BY flexPATH and  flexPATH Index+ POWERED BY flexPATH



 My Retirement Path

 My Compass Index

 Flex Focus

 RetirePilot

 IndexSelect

 My Compass

 ManageForMe flexPATH

 CAPITAL GROUP[®] | AMERICAN FUNDS[®]

SmartGoal

RetirePilot Fidelity Blend

 CAPITAL GROUP[®] | AMERICAN FUNDS[®]



 CAPITAL GROUP[®] | AMERICAN FUNDS[®]

 Great Gray American Funds
Income Series

 Target IncomePo partner

 RetirementTrack

 flexFIT+

 IndexSelect
Income Series

 CAPITAL GROUP[®] | AMERICAN FUNDS[®]

 CAPITAL GROUP[®] | AMERICAN FUNDS[®]

Putnam Retirement
Advantage Income

CITS FEATURE BEST-IN-CLASS MANAGERS

U.S. Equity

Value

Blend

Growth

Large

Putnam INVESTMENTS J.P.Morgan
MFS

BlackRock
CAPITAL GROUP AMERICAN FUNDS

ALLIANCEBERNSTEIN American Century Investments
ClearBridge INVESTMENTS J.P.Morgan

Large

Mid

Allspring
American Century Investments

BlackRock
Janus Henderson INVESTORS

Mid

Small

American Century Investments
PIMCO

BlackRock

ALLIANCEBERNSTEIN VOYA
NEUBERGER BERMAN

Small

Int'l Equity

Value

Blend

Growth

Large

PIMCO

Fidelity CAPITAL GROUP AMERICAN FUNDS

MFS

Large

Emerging Markets

BlackRock

Invesco

BlackRock

Fidelity

CAPITAL GROUP AMERICAN FUNDS

LODGE ABERT

Prudential

WESTERN ASSET

Income

Fixed

Principal Putnam INVESTMENTS

Stable Value

Amundi ASSET MANAGEMENT

ESG Balance

Principal

US REIT

flexPATH STRATEGIES

Cash Balance

FLEXPATH RESOURCES



Kellen Foley

Dir. Investment Management



Matt Giovinazzo

Dir. Investment Management



Alex Khan

Sr. Investment Advisor



Jonathan Coombs

Sr. Investment Advisor



Ellie Armstrong

Investment Analyst



KC Chiravanich

Investment Analyst



Reese Wong

Investment Analyst

TOTAL CUSTOM SOLUTIONS CIT GROWTH

(in billions)





 **flexPATH**[®]
STRATEGIES



 **RPAG**

LEVERAGE SCALE

152,000
of Plans

\$1.6 Trillion AUI

