



JUBILEE

2024 NATIONAL CONFERENCE

JESSE TAYLOR

SVP, Business Development



R

P

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Retirement



Plan



Advisory



Group



Resilience



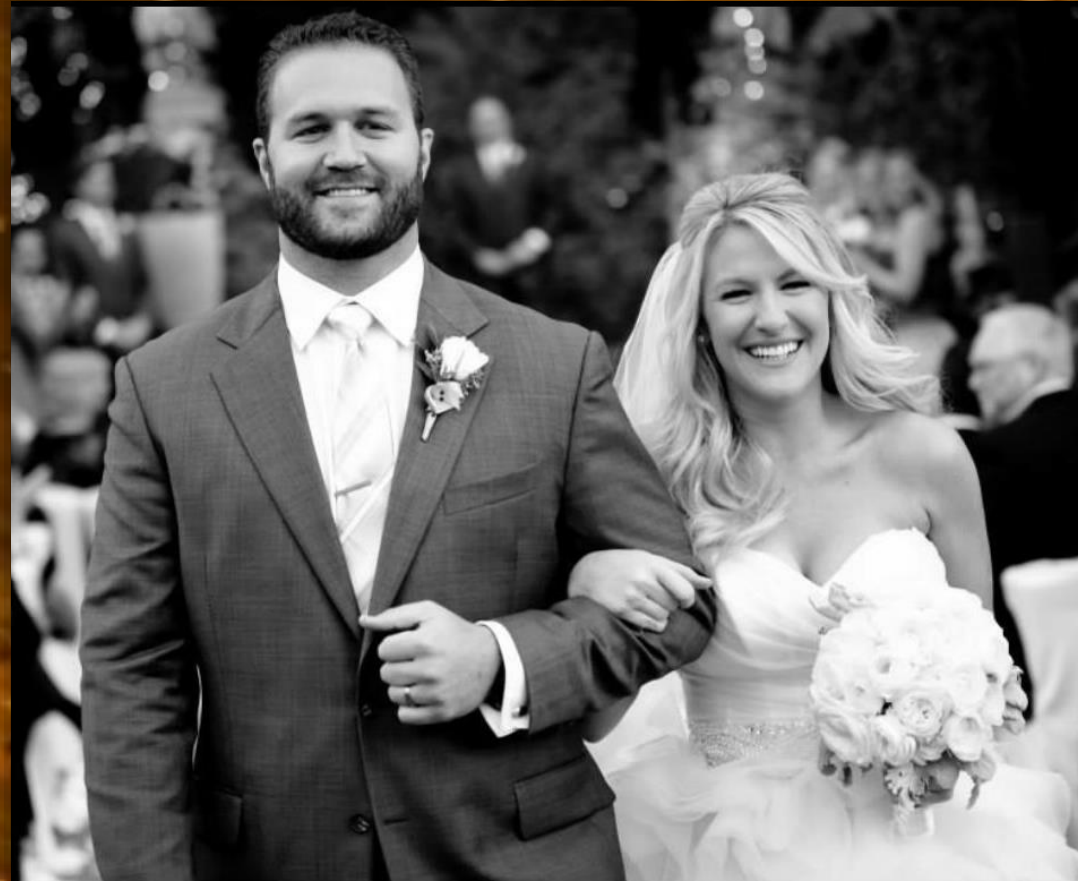
Partnership



Authenticity



Gratitude



20

Years of RPAG

15

My 15th
Conference

10

Years of
Marriage

40

Years Old

1ST

HOA Dispute With Neighbor
Over Fence Height

401(k) Producer Services
 401(k) Producer Services
 2007 PRODUCER SERVICES CONFERENCE & WORKSHOP
 September 4th - 6th
 Laguna Beach, California

Impact 2008
 RETIREMENT PLAN ADVISORY GROUP
 Fourth Annual Conference & Workshop
 Where serious retirement advisors build it big
 September 7-9, 2008
 Ritz-Carlton • Laguna Niguel, California

RETIREMENT PLAN ADVISORY GROUP
NEXUS 2010
 THE POINT WHERE INTELLIGENCE & INGENUITY CONVERGE
 SEPTEMBER 12-14, 2010
 RITZ-CARLTON LAGUNA NIGUEL, CALIFORNIA

RETIREMENT PLAN ADVISORY GROUP
ipoint 2011
 7th Annual Conference & Workshop
 September 11-13, 2011
 Ritz-Carlton Laguna Niguel, CA

RETIREMENT PLAN ADVISORY GROUP
PRECISION MASTERY PRIDE
 8TH ANNUAL CONFERENCE & WORKSHOP
 September 9-11, 2012
 Ritz-Carlton Laguna Niguel, CA

RETIREMENT PLAN ADVISORY GROUP
ENGAGE
 9TH ANNUAL CONFERENCE
 September 8-10, 2013
 Ritz-Carlton Laguna Niguel, CA

Inspire
 10th National Conference
 September 7-9, 2014
 Ritz-Carlton Laguna Niguel, CA
 RETIREMENT PLAN ADVISORY GROUP

September 13-15, 2015
 Ritz-Carlton Laguna Niguel, CA
connect
 2015 RPAG NATIONAL CONFERENCE
 RETIREMENT PLAN ADVISORY GROUP

evolve
2016 RPAG NATIONAL CONFERENCE

CHANGE YOUR MINDSET

September 11-13, 2016
The Ritz-Carlton, Laguna Niguel, CA

National Conference
UNIQUE & UNRIVALED

BEYOND
2018 RPAG NATIONAL CONFERENCE

AMPLIFY
2019 NATIONAL CONFERENCE

2020 RPAG VIRTUAL CONFERENCE
reimagine

F O R W A R D
2021 RPAG NATIONAL CONFERENCE

DRIVE
2022 NATIONAL CONFERENCE

UNLOCK YOUR POTENTIAL

LIMITLESS
2023 RPAG NATIONAL CONFERENCE

2010



NEXUS 2010
SEPTEMBER 12-14
LAGUNA NIGUEL, CA

The banner features a blue background with a photograph of a residential neighborhood on a hillside. Two large, stylized arrows, one pointing up and one pointing down, are overlaid on the image. The word 'NEXUS' is written in large, white, bold letters, with the year '2010' in smaller, orange and yellow letters to its right. Below the main title, the dates and location are listed in white text.

2010



\$60B
AUI

18K
Plans

e401k Proposal™ Questions or assistance please call 877-360-2480 x249
[FAQs](#) - [Provider Contacts](#)

Home Logout Help

Welcome Sample Advisor, to the e401k Proposal Generator!
What would you like to do?

Create Provider Comparison Reports

- Basic Services & Investment Program Overview
- Custom Fee, Service & Investment Analysis

Update Your Information

- Contact Information
- Presenters
- Logo

Scorecard™ Generator

Home Logout Help

Header:Section Title	Section			
<input type="checkbox"/> Table of Contents	Table of Contents		▲	▼ Edit X
<input type="checkbox"/> Title Page	Title Page		▲	▼ Edit X
<input type="checkbox"/> Mission Statement	Mission Statement		▲	▼ Edit X
<input checked="" type="checkbox"/> Service Plan	Service Plan		▲	▼ Edit X
<input checked="" type="checkbox"/> Market Review	Market Review		▲	▼ Edit X
<input checked="" type="checkbox"/> Investment Policy Statement	Investment Policy Statement		▲	▼ Edit X
<input checked="" type="checkbox"/> Scorecard Methodology	Scorecard Methodology		▲	▼ Edit X
<input type="checkbox"/> Scorecard	Scorecard		▲	▼ Edit X
<input type="checkbox"/> Fund History	Fund History		▲	▼ Edit X
<input checked="" type="checkbox"/> Investment Due Diligence Process	Investment Due Diligence Process		▲	▼ Edit X
<input type="checkbox"/> Investment Due Diligence Report	Investment Due Diligence Report		▲	▼ Edit X
<input type="checkbox"/> Asset Class Definitions	Asset Class Definitions		▲	▼ Edit X
<input type="checkbox"/> Glossary	Glossary		▲	▼ Edit X
<input type="checkbox"/> Style Box	Style Box Analysis (Core)		▲	▼ Edit X
<input type="checkbox"/> Asset Class Analysis	Asset Class Analysis		▲	▼ Edit X
<input type="checkbox"/> Investment Returns	Investment Returns		▲	▼ Edit X
<input checked="" type="checkbox"/> Service Highlights	Service Highlights		▲	▼ Edit X
<input checked="" type="checkbox"/> Fund Fact Sheets	Fund Fact Sheet		▲	▼ Edit X
<input checked="" type="checkbox"/> Appendix	Appendix Documents		▲	▼ Edit X

[Add Section](#) [Finish](#)

- Launch of e401k
- My RPAG debut
- Slides were.... rough

Quarter End Fund Scores

18 Business Days

NEXUS 2010

Jesse Taylor, Advisor Service Specialist

N

Business & Risk Management | Education & Communication | Compliance | Investment | RFP Benchmarking | Sales & Marketing

Welcome to the Retirement Plan Advisory Group Knowledge Center

Sample Advisor

KNOWLEDGE CENTER

With a high-functioning back-office, you are better prepared to serve your plan sponsor clients. And, find more time to build new business. Our full-service advisor portal is designed with you in mind. Click below for some of the more commonly used applications and tools.

- FIDUCIARY BRIEFCASE**
- EVENTS CALENDAR**
- NEWS LETTERS**
- COMPENSATION CALCULATOR**

<p>» Scorecard™ Generator</p> <p>Our proprietary Scorecard™ System allows you to automatically rank funds and conduct in-depth investment analysis with polished reports, quickly and efficiently.</p>	<p>» e401k Proposal™</p> <p>Our proprietary online proposal system offers an expedient method for creating your own RFPs. Vendor data and report templates are always at your fingertips.</p>
<p>» Larkspur</p> <p>Step up your prospecting with access to the industry's leading database of qualified retirement and group benefit plans.</p>	<p>» Quarterly Market and Investment Update</p> <p>Stay informed about economic and performance related topics, investment manager due diligence and industry issues with our Quarterly Market and Investment Update.</p>

Home | Support | Business & Risk Management | Education & Communication | Compliance | Investment | RFP Benchmarking | Sales & Marketing | My Settings

Search For: Funds

Vendor: ADP

Product: Access

Asset Class: All

Fund Name:

Ticker Symbol: [Insert Multiple Tickers](#)

Minimum Score: 0

Strategy: All

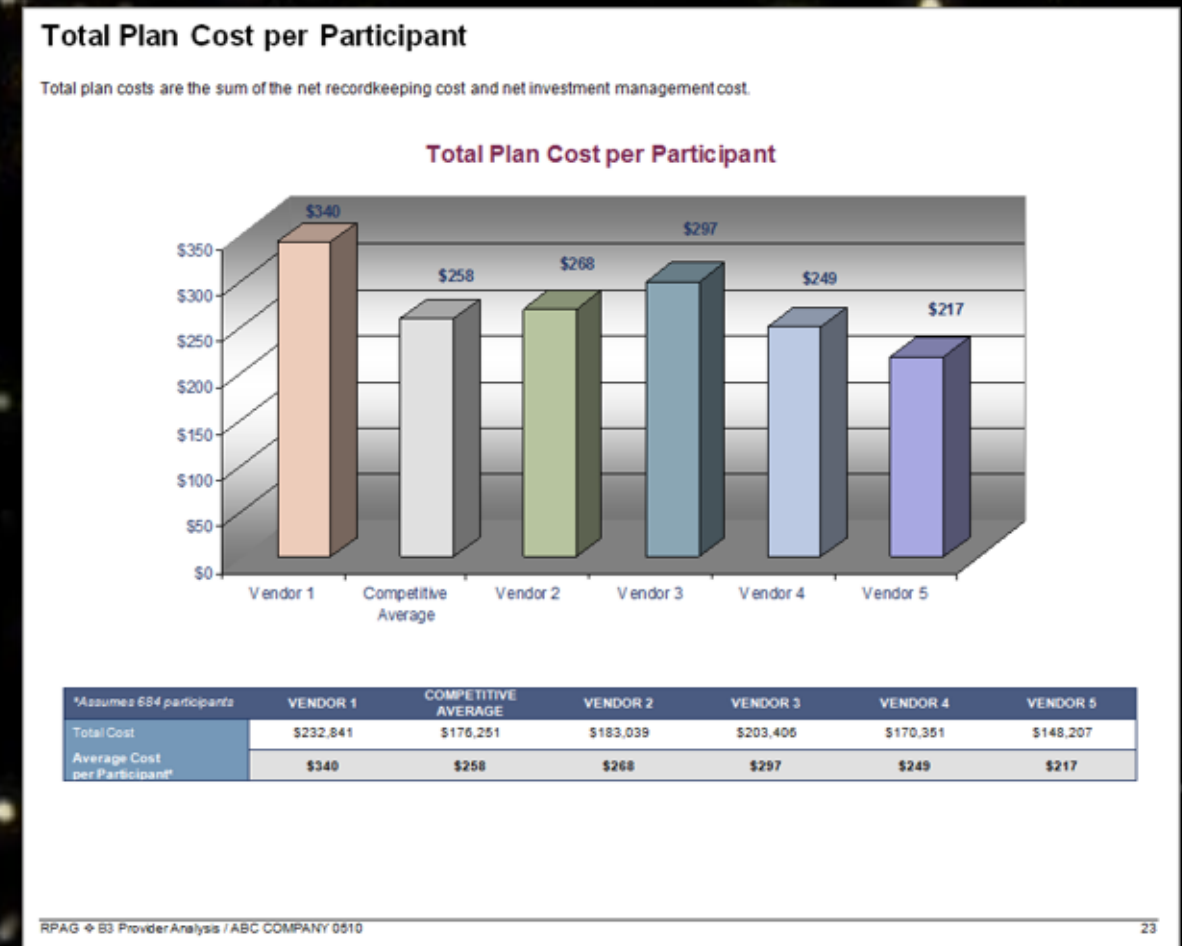
Share Class: All

Exclude Watchlisted Funds:

Exclude Funds Recommended for Elimination:

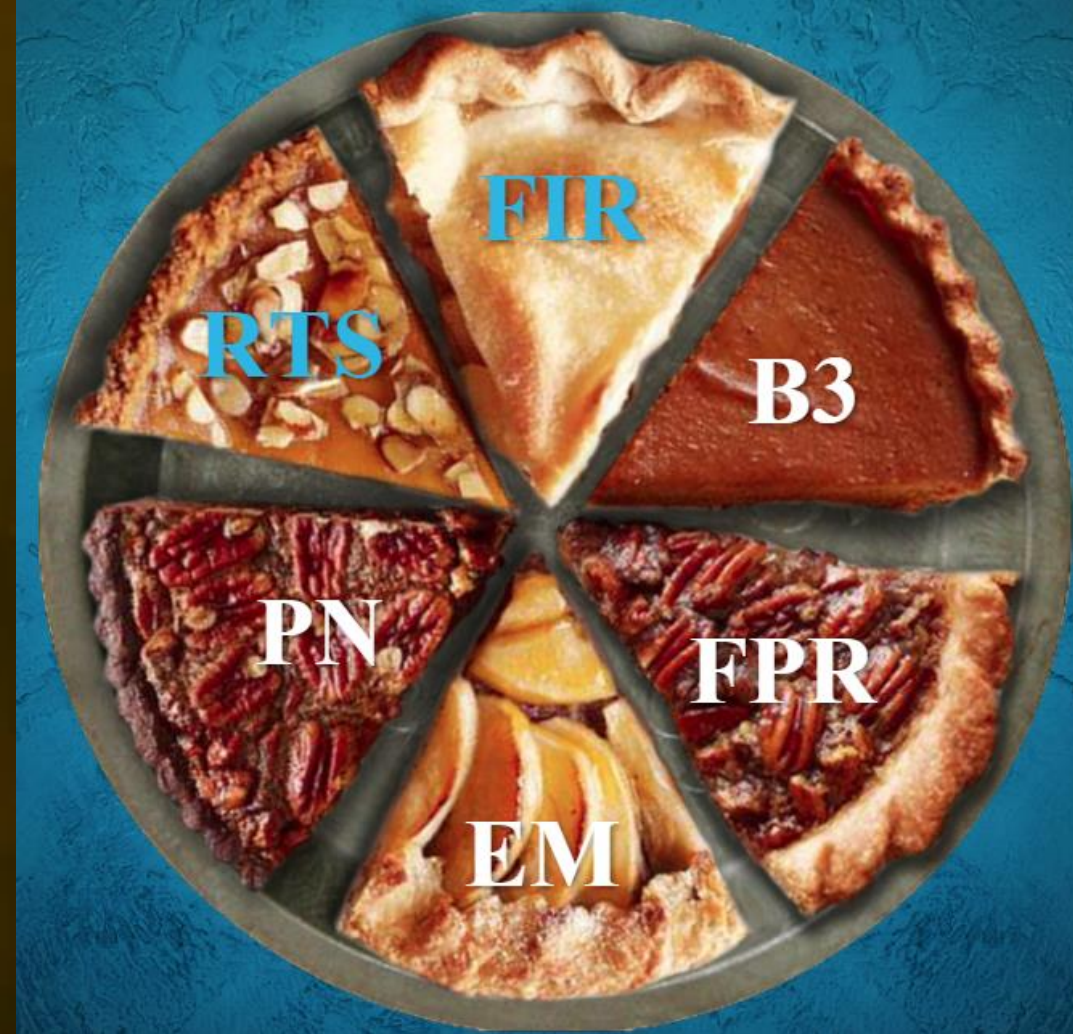
Expense Ratio: From To

Exclude 12b-1 Fees:



2014





2014



\$150B

AUI

28K

Plans

3,000

PAL Plans



- Launch of flexPATH
- Kellen, Matt (2013), Alex, Jon
- Pumped about PLANavigator and PAL

ScorecardSM Generator

[Home](#)[Logout](#)[Help](#)

Welcome to the Retirement Plan Advisory Group Scorecard Generator!

What would you like to do?

Build a New Report

- [Create a Client Scorecard](#)
- [Create a Vendor Scorecard](#)
- [Create a Custom Fund Line-Up](#) **NEW**
- [Create a Fund Mapping](#) **NEW**
- [Create a Scorecard/Lineup Comparison](#) **NEW**
- [Create a Custom Asset Class Report](#)
- [Create a Fund Fact Sheet](#)

Access Existing Reports

- [Saved Client Scorecards](#)
- [Saved Custom Fund Line-Ups](#) **NEW**
- [Saved Fund Mappings](#) **NEW**
- [Saved Comparisons](#) **NEW**

Account Management

- [Manage My Account](#)
- [Customer Profiles](#)
- [Create New Profile](#)
- [Manage Core Asset Classes \(Custom\)](#) **NEW**
- [Manage Investment Review Templates](#) **NEW**

Logo

Overview of Services

Where Ingenuity Creates Impact

2019

AMPLIFY



2019



\$500B

AUI

60K

Plans

42,000

PAL Plans



- Launch of WellCents & PlanFees
- Luke Vandermillen debut
- Kellen lost at Jeopardy
- Covid, Zoom and masks didn't exist yet



R P
A G

JUBILEE

2024 NATIONAL CONFERENCE

2024



\$1.6T

AUI

150K

Plans

120,000

PAL Plans



RPAG INNOVATION



DISCOVER



DESIGN

DEVELOP



DEPLOY





PLATFORM

PLATFORM

2006

2010

2011

2012

2014

2018

2019

2020

2021

2022

2023

Fiduciary
Fitness
Program

Fiduciary
Briefcase

Resource
Center

PMP

PAL Data
Aggregation

Advisor iQ

Custom
Report
Branding

WellCents

Automated
Meeting
Minutes

BD/RIA
Compliance

Automated
Agendas

RPAG PORTAL UPDATES

28

Deployments

80K

RC Docs

400K

Reports

718

Tickets

40K

Meeting Minutes

PAL

120K

Plans
on PAL

100+

Providers
on PAL

450

Monthly Files
Processed

1.44M

Feeds Processed
Annually



Book Your 1on1 401(k) Education Meeting



Meet With Jesse

< August 2024 >

SUN MON TUE WED THU FRI SAT

1 2 3

4 5 6 7 8 9 10

Unlock the full potential of your 401k plan participants with RPAG Wellness. Our specialized service for financial advisors provides essential

RPAG WELLNESS

WellCents “de-branding”

More focus on your brand

Enhanced calendar/meeting integrations

Enhanced user experience

COMING 2025!



Personalized Consultations

At RPAG Wellness, we understand that each 401k plan participant's needs are unique. That's why we offer personalized consultations aimed at understanding individual financial situations and providing tailored advice. Our expert advisors are committed to helping you navigate the complexities of retirement planning, ensuring you can make informed decisions that benefit your financial future.

Educational Tools for Empowerment

Empower your clients with our state-of-the-art educational tools and resources. RPAG Wellness provides a variety of materials designed to enhance understanding of 401k plans and financial wellness. From interactive webinars to in-depth articles and guides, we equip financial advisors with the knowledge they need to educate their clients effectively and foster financial literacy.



Comprehensive Assessment Tools

Our advanced financial wellness assessment tools are crafted to offer deep insights into the financial health of 401k plan participants. These tools help identify areas of strength and

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RPAi

Closed version of OpenAi

Plan data analysis

RPAG FAQs and information

Resource Center topic search

ALPHA COMING Q4!

RPAi alpha Chatbot

Welcome! My name is RPAG AI Chatbot. How can I assist you today?

How many of my plans have a match?

You have a total of 13 retirement plans with a Vesting Employer SafeHarbor Match. Additionally, you have 18 retirement plans with a Vesting Employer Match.

RPAG Chatbot

Welcome! My name is RPAG AI Chatbot. How can I assist you today?

How can I host my Fiduciary briefcase link on my own site?

To host your Fiduciary Briefcase link on your own website, you can follow these steps:

1. Obtain the HTML code for the Fiduciary Briefcase link from your RPAG representative or the Fiduciary Briefcase platform.
2. Log in to your website's content management system (CMS) or website builder.
3. Navigate to the page where you want to add the Fiduciary Briefcase link.
4. Edit the page or add a new block/element where you want the link to appear.
5. Switch to the HTML or code view of the page editor.
6. Paste the HTML code for the Fiduciary Briefcase link in the appropriate location.
7. Save or publish the changes to your website.

By following these steps, you should be able to host your Fiduciary Briefcase link on your own website. If you encounter any difficulties or require further assistance, please let me know.

Requests Processed: 2/10

RPAi alpha Chatbot

JHFunds2 Core Bond 1	JICDX	Core Fixed Income	6	12,823.22
JHancock Multimanager Lifestyle Gr 1	JILGX	Moderate Aggressive	7	595,552.94
JHancock Multimanager Lifestyle Bal 1				
JHancock Multimanager Lifestyle Cnsvr 1				
JHancock Multimanager Lifestyle Mod 1				
Invesco Global Y				
Invesco Oppenheimer International Gr Y				
PIMCO Real Return A				

The fund with the most assets in the Lifestyle Bal 1* fund with assets of \$

RPAi alpha Chatbot

Welcome! My name is RPAG AI Chatbot. How can I assist you today?

what the Preble Street Section 403(b) Plan have loans?

Yes, the Preble Street Section 403(b) Plan does have loan provisions.

hardship is available?

Yes, the Preble Street Section 403(b) Plan does have hardship provisions.

what is the match formula?

The match formula for the Preble Street Section 403(b) Plan is 25% of the 1st 4% of Compensation.

Requests Processed: 3/10

SCORECARD SYSTEM



SCORECARD SYSTEM

2004

2009

2010

2014

2015

2017

2020

2022

2023

Scorecard System

TDF Fit Process

Asset Class Reviews

Fact Sheets

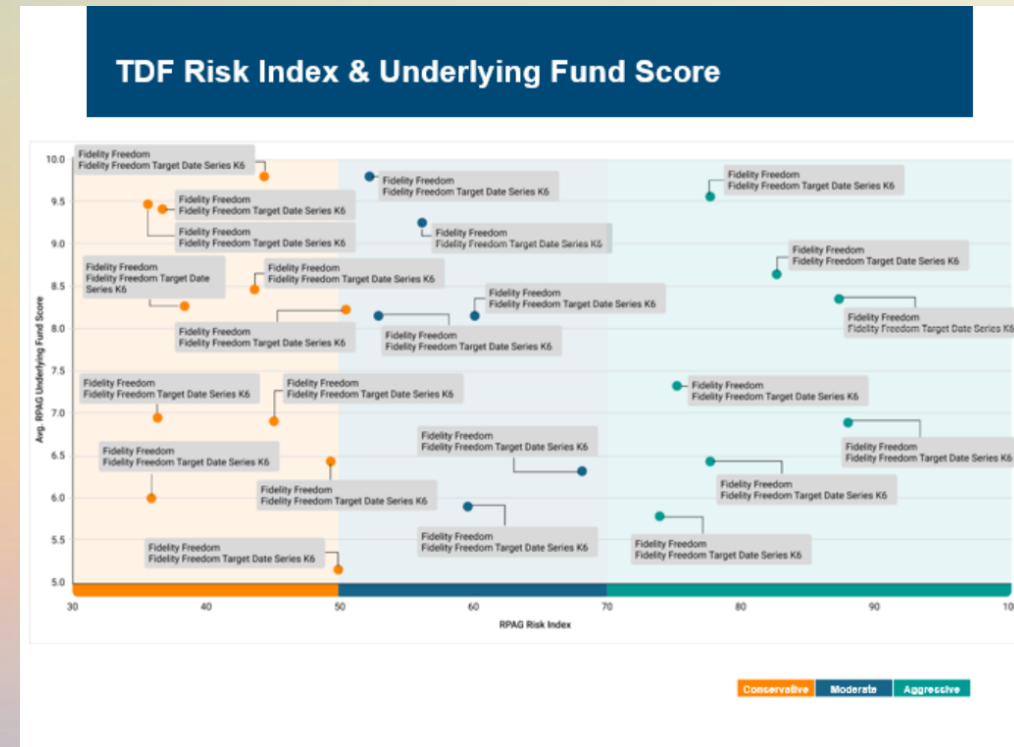
flexPATH CITs

TDF Analyzer

Stable Value Analyzer
TDF Blended Scoring

ESG Ratings

CIT Strategy Equivalents



TDF ANALYZER v2.0

Enhanced Interface
 EE Suitability
 New Report Formatting
COMING Q4!

TDF Risk Index

TDFs are categorized into one of three risk postures. Equity exposure at various points in time and the rate of transition away from riskier investments are key factors.

Risk Posture	Risk Index Range	Description
Conservative	<55	TDF strategies have lower risk scores.
Moderate	55-69	TDF strategies have middle of the road risk scores.
Aggressive	>70	TDF strategies have middle of the road risk scores.

Metric	Description	Index Weight
Equity exposure at retirement (age 65)	Equity risk is responsible for a large portion of the volatility in broadly diversified portfolios. The time around retirement is an especially critical period for participants, and thus this metric has the highest weighting in the index.	65%
Glidepath slope	A steeper glidepath that transitions away from high-risk to risk-free assets near retirement age limits the ability to recover large losses and is more susceptible to sequencing risk.	25%
Equity exposure at the start of the glidepath	A glidepath's beginning equity percentage.	2.5%
Equity exposure at the end of the glidepath	A glidepath's ending equity percentage, which may be at retirement age or past retirement age depending on the structure of the glidepath.	7.5%

TDF data is updated at least annually, and the risk index for any particular fund may change to reflect updated information. The risk index is limited to only target date fund asset allocation series. IMPORTANT: The projections or other information generated by the risk index regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results and are not guarantees of future results.



BENCHMARKING SUITE

RFP / BENCHMARKING

2005

2010

2014

2018

2020

2022

2023

B3 Report

e401k

B3 Provider
Analysis v2

B2
Report

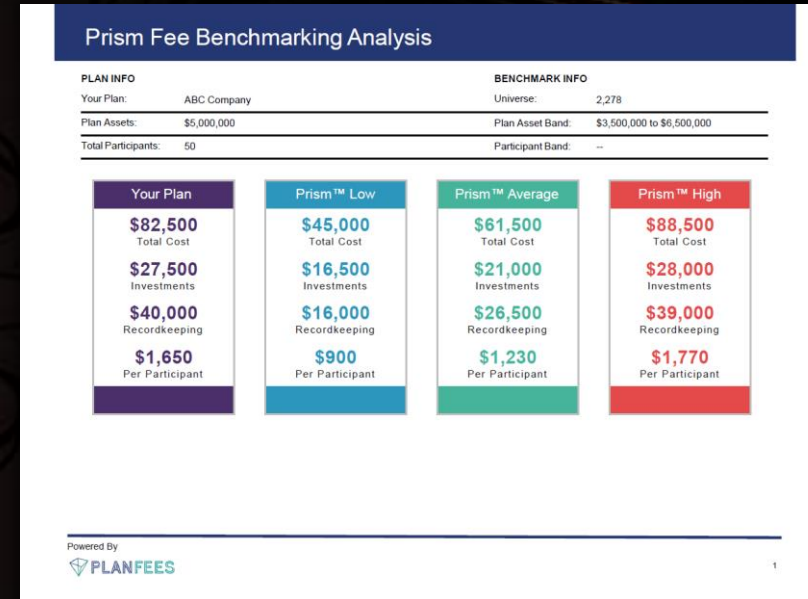
Cyber
Security
PlanFees
Prism

PlanFees
Prism 365

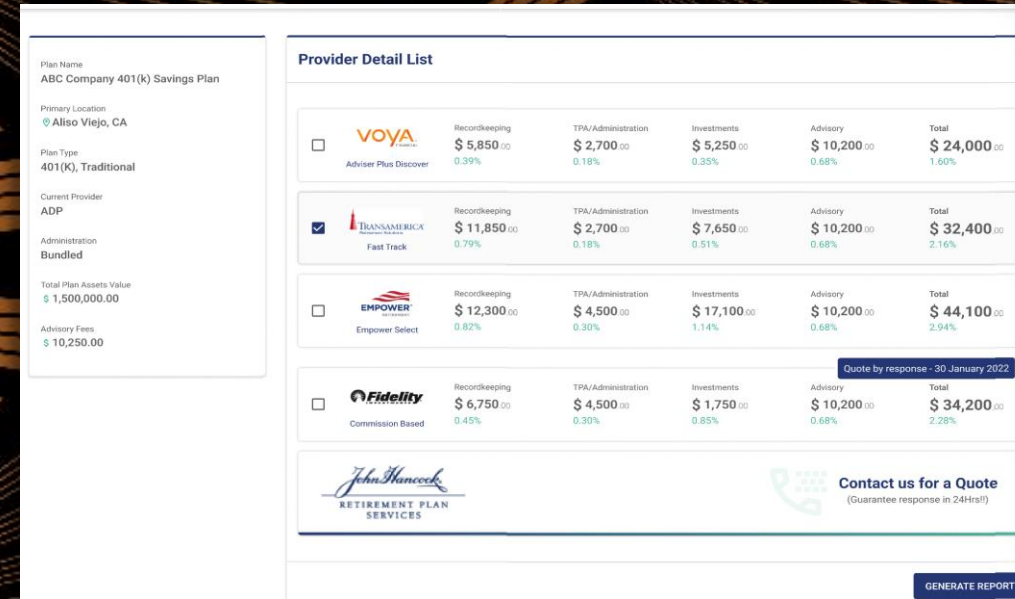
RFP Express

BENCHMARKING SUITE

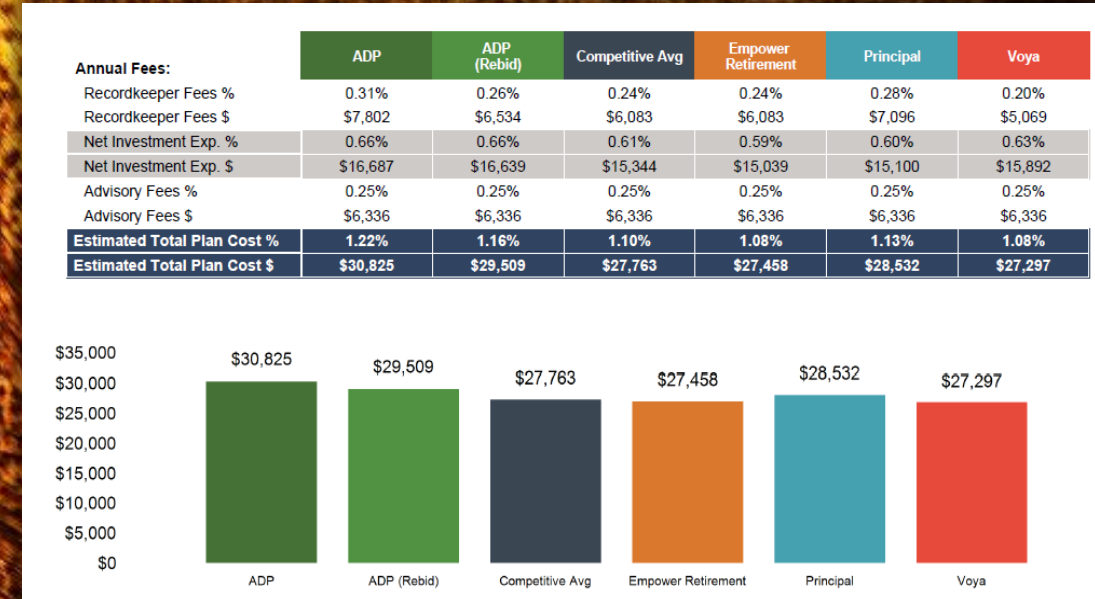
PlanFees



RFP Express



Provider Analysis



PROVIDER ANALYSIS

25K

Total RFP
Reports

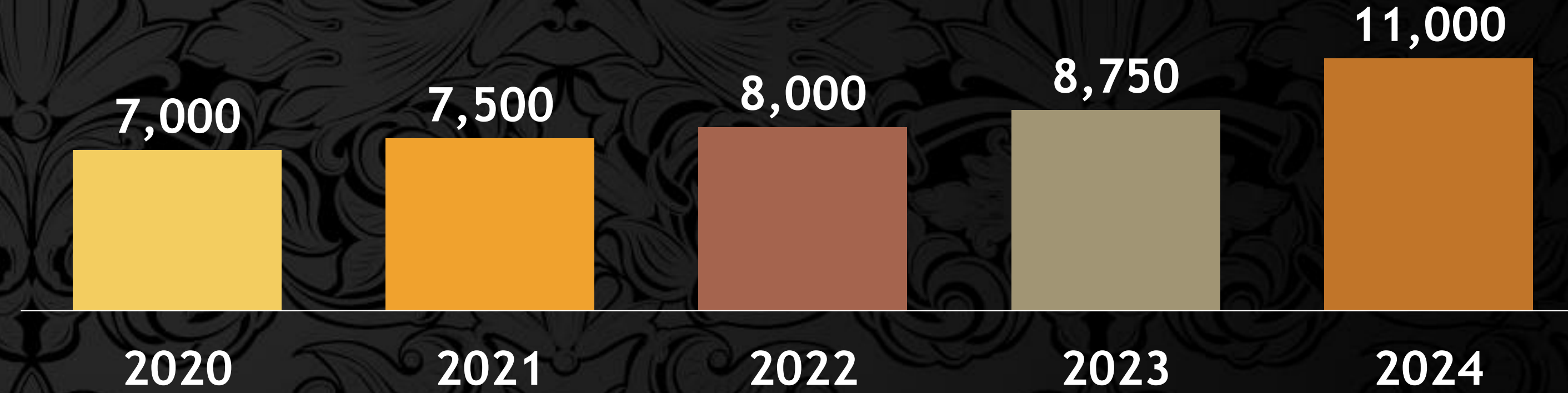
100K+

Bids
All Time

\$4T

Assets
Benchmarked

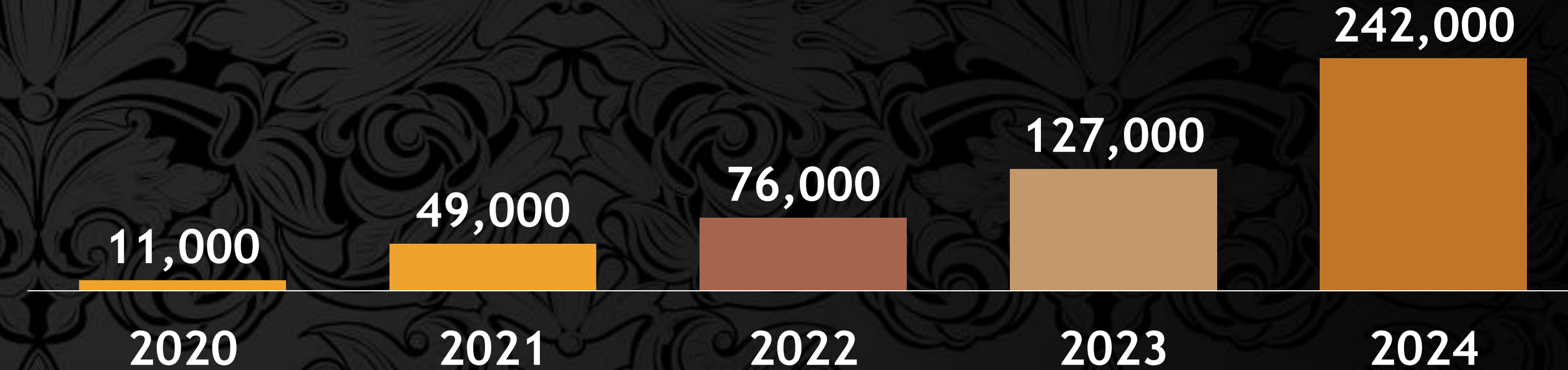
Live Bids



PLANFEES

500,000+

PlanFees Prism Reports All Time



1,600

RFPX Reports
In 2024

75%

Instant
Quotes

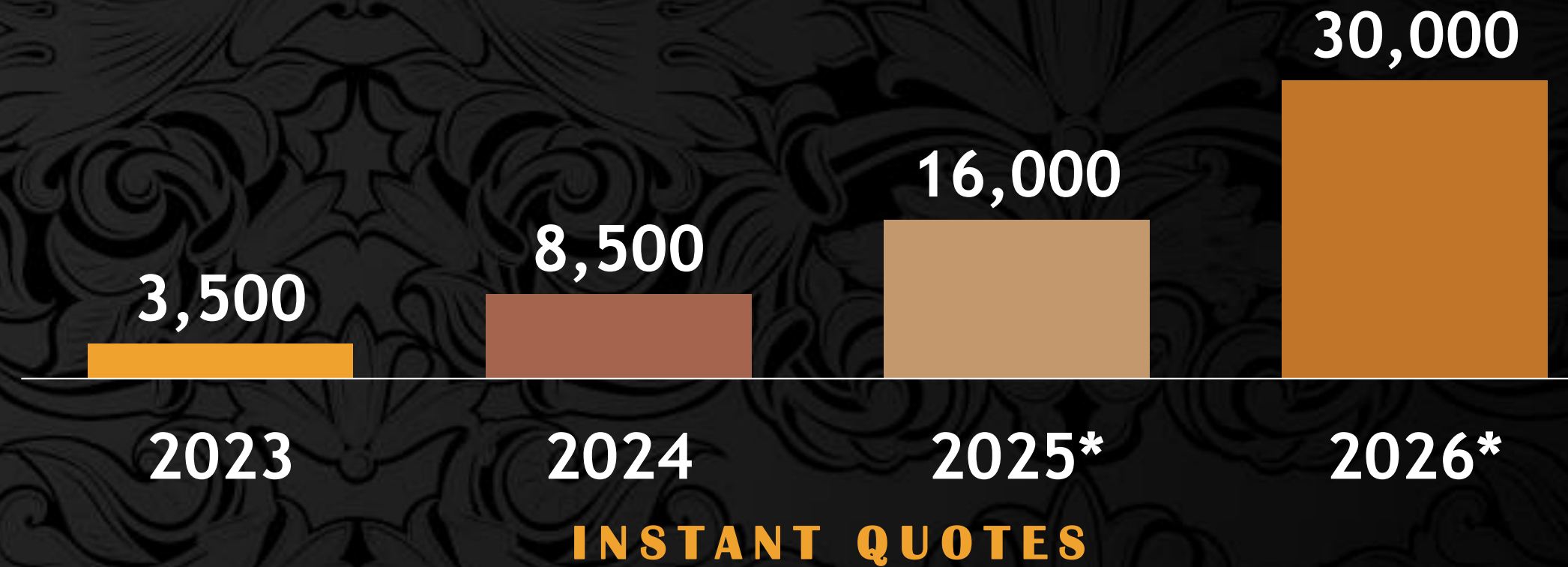
33

Top Providers

61

401(k) Solutions

RFP EXPRESS



REP-X

RECORDKEEPERS WITH INSTANT QUOTE ABILITY



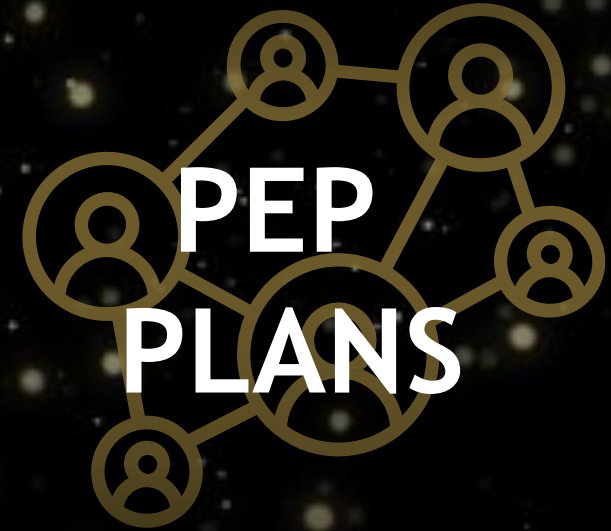
AND MORE!

RFPX 2024 ENHANCEMENTS

**START-UP
PLANS**



**PEP
PLANS**



**ENHANCED
CUSTOM QUOTES**



**OPEN ARCHITECTURE
PRICING**



PLANFEES

Prism Plus

Comprehensive Retirement Plan Benchmarking Report

PREPARED FOR:
ABC Company

February 1, 2024

Advisor Name
FIRM NAME
email@email.com
555-555-5555

Prism Plan Summary

Average RPAG Score: Your Plan: 7.9, Benchmark Universe: 6.5

Scorecard Breakdown: # of Funds vs RPAG Score (10-9, 8-7, 6-5, 4-0)

Weighted Expense Ratio: Your Plan: 0.38%, Benchmark Universe: 0.45%

Investment Type	Assets	Percentage	Average
Asset Allocation	\$8,453,468	55.7%	40%
U.S. Equity	\$2,669,204	17.6%	15%
Fixed Income	\$2,096,197	13.8%	20%
International/Global Equity	\$989,898	6.5%	15%
Specialty	\$954,354	6.4%	15%
Total	\$15,173,721	100%	

Disclosure Strategy Equivalent Score

PlanFees+

Expanded plan benchmarking, Plan Metrics, RK, admin, investments, detail of B3, immediacy of PlanFees.

Use of extensive RPAG/PlanFees database

COMING 2025!

Plan Metrics

	Benchmark Universe	Your Plan	Points	Value
Participation Rate	83%	75%	5	10
Employer Contributions	\$75,000	\$50,000	5	10
Employee Contributions	\$300,000	\$200,000	5	10
Distributions	\$50,000	\$15,000	10	10
Loans	5			
Loan Amount	\$100,000			
Avg Deferral Rate	4.0%			
TDF/QDIA Utilization	50%			
Company Match Maximization	64%			
Metric 10	50%			

Provider Services – Participant Services

Provider Rank	2024	Benchmark	Criteria	Value
Service Name	Yes	65%	Yes	10 / 10
Service Name	Yes	65%	Yes	10 / 10
Service Name	Yes	65%	Yes	10 / 10
Service Name	Yes	65%	Yes	10 / 10
Service Name	Yes	65%	Yes	10 / 10
Service Name	Yes	65%	Yes	10 / 10
Service Name	Yes	65%	Yes	10 / 10
Service Name	Yes	65%	Yes	10 / 10
Service Name	Yes	65%	Yes	10 / 10
Service Name	Yes	65%	Yes	10 / 10
Service Name	Yes	65%	Yes	10 / 10
Service Name	Yes	65%	Yes	10 / 10
Service Name	Yes	65%	Yes	10 / 10

100 / 100

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JUBILEE

2024 NATIONAL CONFERENCE