



JUBILEE

2024 NATIONAL CONFERENCE



R

P

A

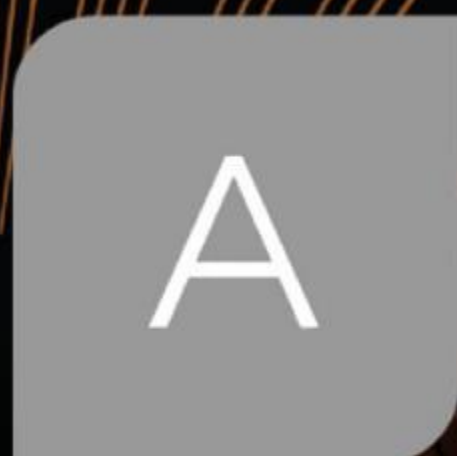
G



Retirement



Plan



Advisory



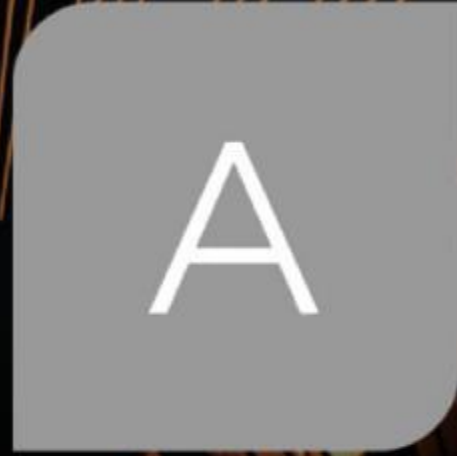
Group



Resilience



Partnership



Authenticity



Gratitude



20

Years of RPAG

15

My 15th
Conference

10

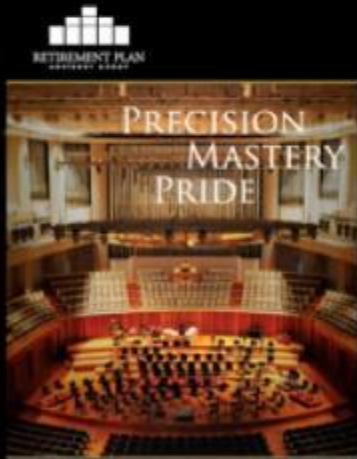
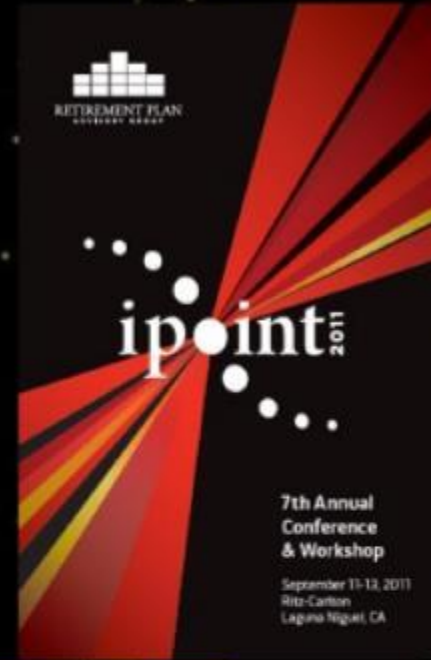
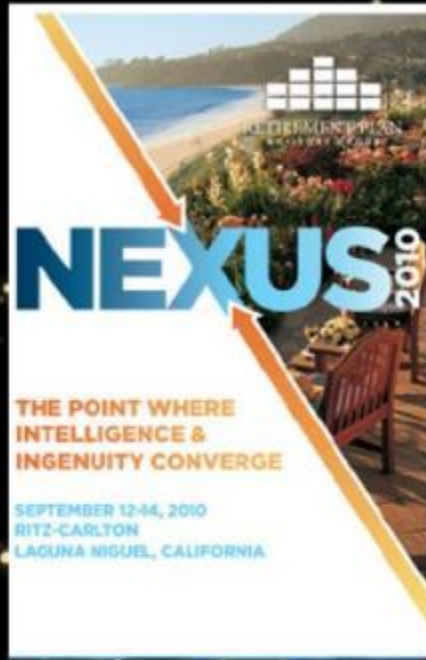
Years of
Marriage

40

Years Old

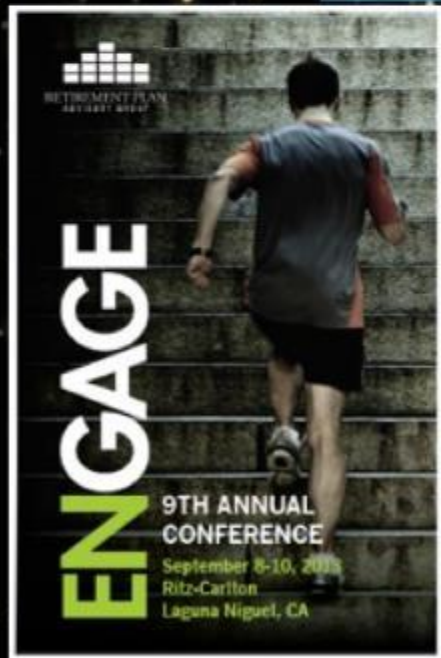
1ST

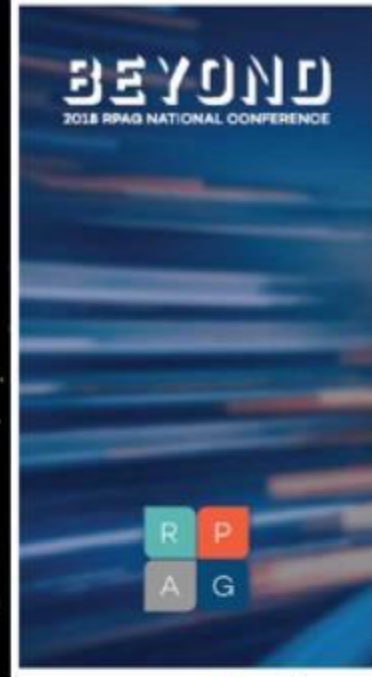
HOA Dispute With
Neighbor Over Fence
Height



8TH ANNUAL
CONFERENCE
& WORKSHOP

September 9-11, 2012
Ritz-Carlton
Laguna Niguel, CA





2010



2010



\$60B AUI

18K Plans



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



Jesse Taylor, Advisor Service Specialist



Business & Plan 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.

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

Scorecard™ Generator
 Our proprietary Scorecard™ System allows you to automatically rank funds and conduct in-depth investment analysis with polished reports, quality and efficiency.

s401k Proposal™
 Our proprietary online proposal system offers an expedient method for creating your own 401k. Vendor data and report templates are always at your fingertips.

Larkspur
 Step up your compliance with access to the industry's leading database of qualified retirement and group benefit plans.

Quarterly Market and Investment Update
 Stay informed about economic and performance related topics, investment manager due diligence and industry trends with our Quarterly Market and Investment Update.

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

Search For

Vendor

Product

Asset Class

Fund Name

Ticker Symbol

Minimum Score

Strategy

Share Class

Exclude Watchlisted Funds

Exclude Funds Recommended for Elimination

Expense Ratio

Exclude 12b-1 Fees

Funds

ADP

Access

All

Insert Multiple Tickers

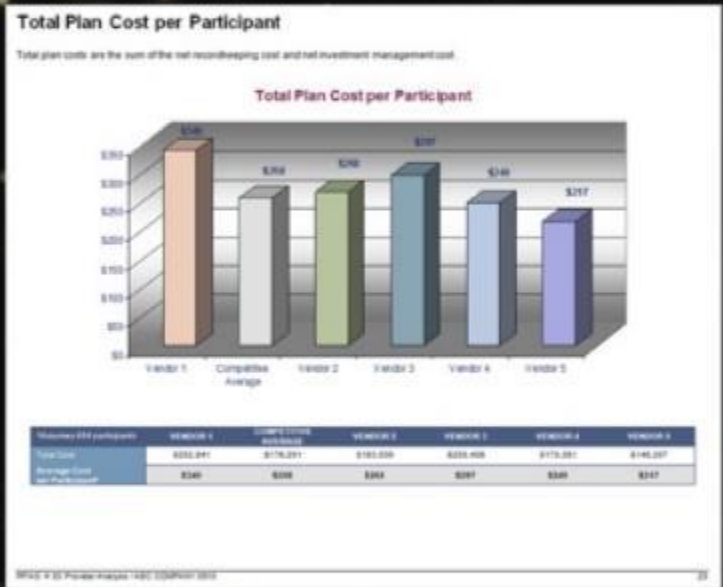
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All

All

From To

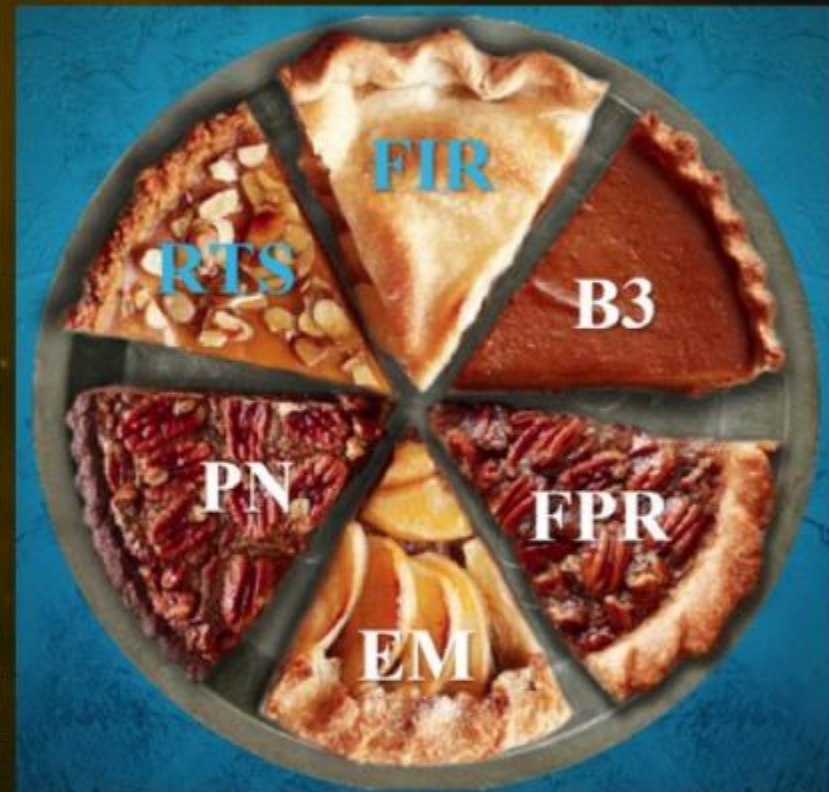
Search



2014



Inspire



2014



\$150B

AUI

28K

Plans

3,000

PAL Plans

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



[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

Account Management

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



2019

AMPLIFY



2019

\$500B

60K

AUI

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

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2024



\$1.6T

AUI

150K

Plans

120,000

PAL Plans



RPAG INNOVATION



DISCOVER

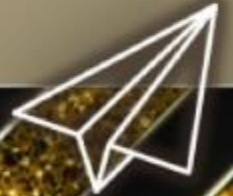


DESIGN

DEVELOP



DEPLOY



The image shows a highly textured, golden-brown surface, likely a piece of machinery or a platform. The texture is uneven and fibrous, with many small, dark fibers or strands visible. The lighting is warm and directional, coming from the upper right, which creates strong highlights and deep shadows, emphasizing the roughness of the material. On the right side, there is a vertical edge or seam, possibly a joint or a boundary of a component. The overall appearance is that of a complex, industrial or mechanical part.

PLATFORM

PLATFORM

2006

Fiduciary Fitness Program

2010

Fiduciary Briefcase

2011

Resource Center

2012

PMP

2014

PAL Data Aggregation

2018

Advisor iQ

2019

Custom Report Branding

2020

WellCents

2021

Automated Meeting Minutes

2022

BD/RIA Compliance

2023

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

RPAG WELLNESS

WellCents “de-branding”

More focus on your brand

Enhanced calendar/meeting integrations

Enhanced user experience

COMING 2025!



Personalized Consultations

RPAG Wellness, an advisor-led platform, offers personalized consultations to help you understand your 401(k) plan. Our experts provide guidance on investment options, loan and withdrawal options, and more. Schedule a consultation today to get the most out of your 401(k) plan.

Educational Tools for Empowerment

Empower your clients with the tools of the 401(k) plan. Our educational tools provide a comprehensive overview of the 401(k) plan, including investment options, loan and withdrawal options, and more. These tools are designed to help you understand your 401(k) plan and make informed decisions.

Comprehensive Assessment Tools

Our advanced financial wellness assessment tool can help you understand your 401(k) plan and make informed decisions. It offers insights into your 401(k) plan and helps you understand your 401(k) plan.



RPAG

Book Your 1on1 401(k) Education Meeting

Meet With Jesse

August 2024

SUN MON TUE WED THU FRI SAT

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

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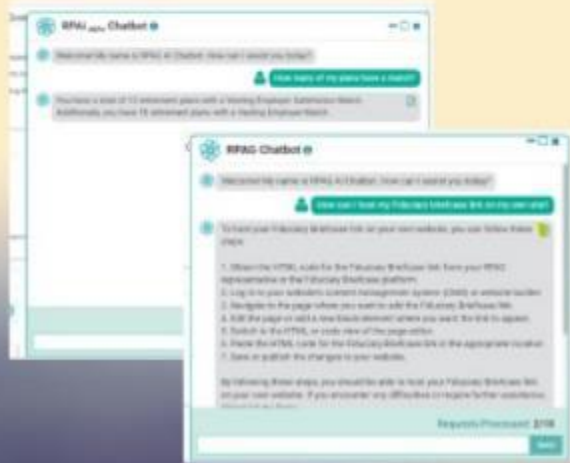
P

A

i

RPAi

Closed version of OpenAi
Plan data analysis
RPAG FAQs and information
Resource Center topic search
ALPHA COMING Q4!



A close-up photograph of a textured, golden-brown surface, possibly a piece of paper or fabric, with the text "SCORECARD SYSTEM" overlaid in white. The texture is intricate, showing fibers and small dark spots. The lighting is warm, creating a rich, golden glow. The text is centered horizontally and has a slight drop shadow, making it stand out against the busy background.

SCORECARD SYSTEM

PLATFORM

2004

Scorecard
System

2009

TDF Fit Process

2010

Asset Class
Review

2014

Fact Sheets

2015

flexPATH CITs

2017

TDF Analyzer

2020

Stable Value
Analyzer

2020

TDF Blended
Scoring

2022

ESG Ratings

2023

CIT Strategy Equivalents

TDF ANALYZER v2.0

Enhanced Interface
EE Suitability
New Report Formatting

COMING Q4!



TDF Risk Index

TDF's 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.

| Conservative | Moderate | Aggressive |
|--|---|---|
| <= 0.40 | 0.40-0.60 | >= 0.60 |
| TDF strategies have lower risk scores. | TDF strategies have middle of the road risk scores. | TDF strategies have middle of the road risk scores. |

| Metric | Description | Index Weight |
|---|--|--------------|
| Equity exposure at retirement age (E) | 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 just retirement age depending on the structure of the glidepath. | 7.5% |

TDF does not intend to make any claim, and the risk score is not intended to be used as a risk rating. The risk score is not intended to be used as a risk rating. The risk score is not intended to be used as a risk rating. The risk score is not intended to be used as a risk rating. The risk score is not intended to be used as a risk rating.



BENCHMARKING SUITE

RFP / BENCHMARKING

2005

B3 Report

2010

e401k

2014

B3 Provider
Analysis v2

2018

B2 Report

2020

Cyber Security

2020

PlanFees Prism

2022

Prism 365

2023

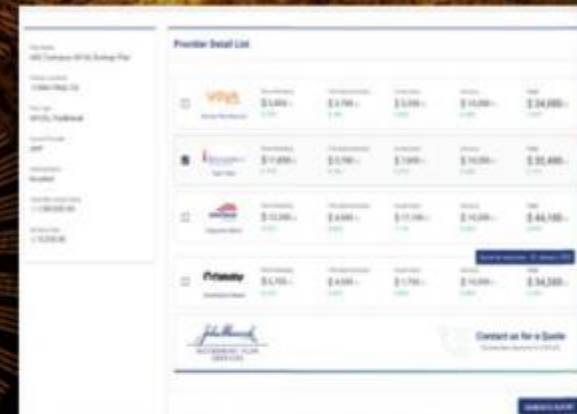
RFP Express

BENCHMARKING SUITE

PlanFees



RFP Express



Provider Analysis



PROVIDER ANALYSIS

25K

Total RFP

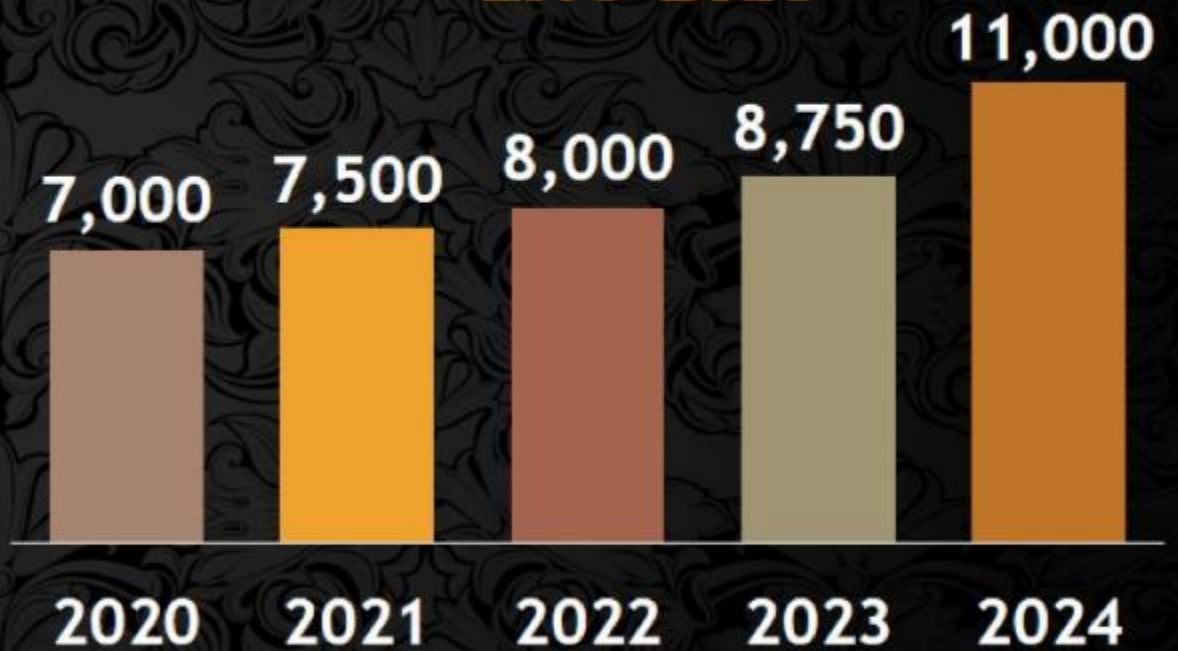
100K+

Bids All Time

\$4T

Assets
Benchmarked

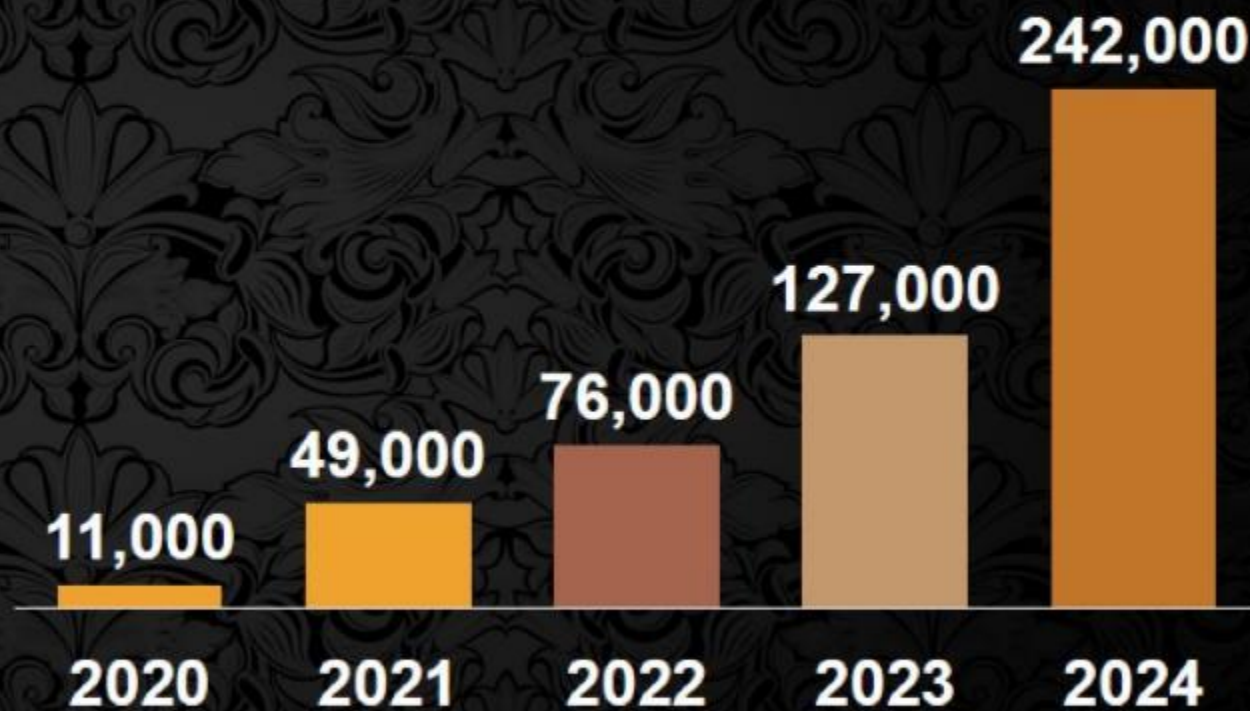
Live Bids



PLANFEES

500,000+

PlanFees Prism Reports All Time



RFP EXPRESS

1,600

RFPX Reports

75%

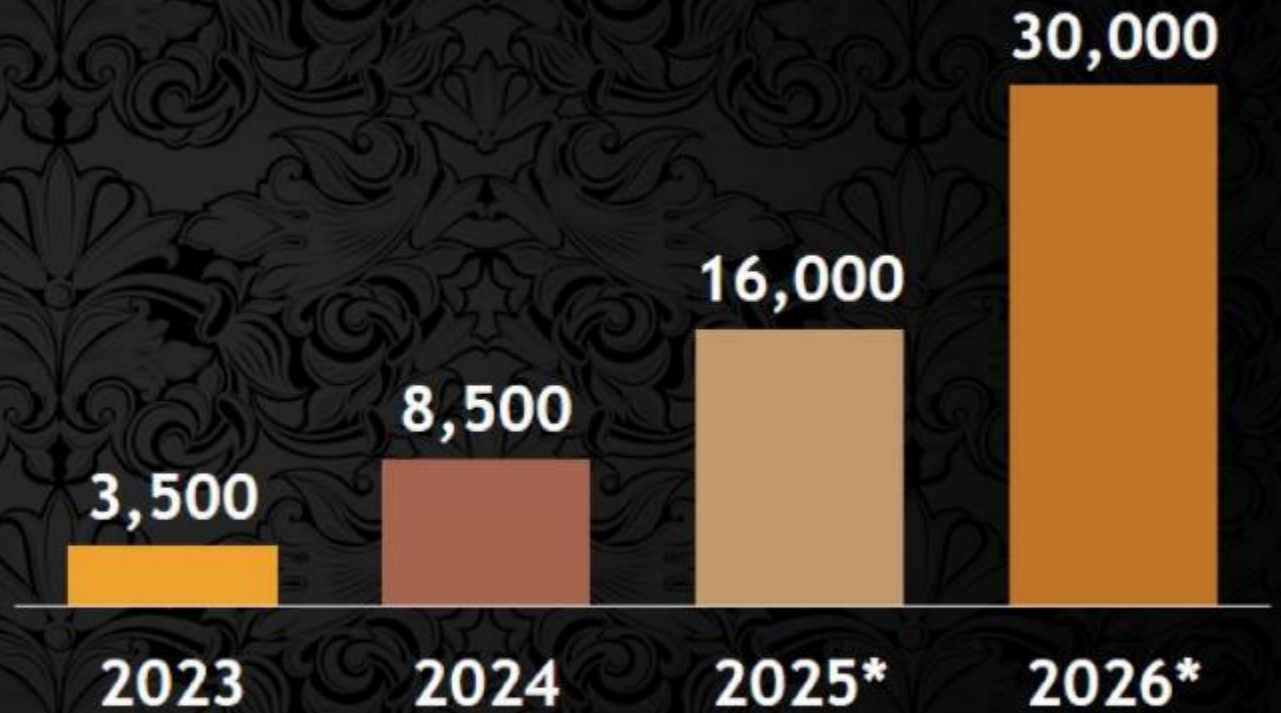
Instant
Quotes

33

Top Providers

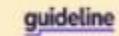
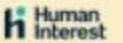
61

401(k)
Solutions



INSTANT QUOTES

RECORDKEEPERS WITH INSTANT QUOTE ABILITY



AND MORE!

RFPX 2024 ENHANCEMENTS



START-UP
PLANS



PEP
PLANS



ENHANCED
CUSTOM QUOTES



OPEN ARCHITECTURE
PRICING

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

| Plan | Year | Value | Change |
|--------|------|-------|--------|
| Plan A | 2023 | 100 | 0% |
| Plan A | 2024 | 110 | 10% |
| Plan B | 2023 | 80 | 0% |
| Plan B | 2024 | 90 | 12.5% |

This screenshot shows a table titled 'Plan Metrics' with columns for Plan, Year, Value, and Change. It displays data for two plans over two years.

Provider Services - Participant Services

| Participant | Service | Value | Change |
|---------------|-----------|-------|--------|
| Participant 1 | Service A | 100 | 0% |
| Participant 1 | Service B | 200 | 0% |
| Participant 2 | Service A | 150 | 0% |
| Participant 2 | Service B | 300 | 0% |

This screenshot shows a table titled 'Provider Services - Participant Services' with columns for Participant, Service, Value, and Change. It displays data for two participants across two services.



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