R P A G

Enterprise iQ

Holistic Solutions for Institutions

Actionable insights. Data driven decisions.

No company wants to miss out on a new opportunity, but how can you recognize one before it's too late? When it comes to your retirement plan business, careful analysis of your data will help you understand advisor and client behavior and even give you the power to make better business decisions that give you a competitive advantage.

With the ever-changing landscape of the retirement plan industry, having clear insight is critical to forming predictive analyses for the future of a company. RPAG's ***Enterprise iQ*** analyzes the raw data of your retirement plan business to produce actionable insights and data-driven decisions. From top-down compliance oversight to monitoring key trends, **Enterprise iQ** identifies the gaps, giving your business more efficiency, productivity and revenue growth, while reducing potential fiduciary liability.

Enterprise iQ Dashboard

Advanced Analytics

- Enterprise-level dashboard gives you the power to monitor trends across key areas such as advisors, plans, assets, fund companies, recordkeepers and fiduciary actions.

Actionable Insights

- Dozens of pre-set and ad-hoc reports can be viewed on the portal and exported to third-party software.
- SSO and API integrations connect your organization and advisors with less effort.

Better Business Decisions

- Holistic advisor block insights at the click of a button.
- Data integrations with more than 100 recordkeepers, trading platforms and investment platforms.
- Discover fiduciary actions taken on investments using the industry's leading RPAG Scorecard score. Track and monitor advisor efficiency, productivity and compensation.
- Top-down oversight of all retirement plan business, including 3(21) and 3(38) platform utilization.

Creating Operational Efficiencies Through PAL

RPAG's Enterprise iQ uses our proprietary Plan Asset Link (PAL) to integrate with more than 65 of the industry's top recordkeepers and trading platforms to provide your business with robust plan-level data aggregation. Additionally, we aggregate data from more than 160 providers through trading platforms. Our advanced data aggregation syncs plan lineups and asset balances as well as other key data points so you have clear vision on your book of business that is accurate and efficient. Our data aggregation is unique in that it reports on funds with a zero-account balance, closed funds and shows instantaneous and accurate expenses and revenue sharing.

Integrated Providers

Below is a partial list of providers that are integrated with PAL. Our list is ever growing, and we will work with any provider, recordkeeper or TPA upon request.

ADP
Alerus
Alliance Benefit Group American Funds
Ameritas Ascensus Aspire AXA BCG
Billings & Company
BlueStar Retirement
CDM Retirement
Charles Schwab
Correll & Company
CUNA Mutual
Employee Fiduciary
Empower
EPIC
ePlan Services
Fidelity
Future Benefits
Horace Mann
ICMA-RC
John Hancock
July Business Services
KTrade
KT Administrators
Lincoln*
MassMutual
Matrix *(160+ providers through trading platform)*
Mid-Atlantic Trust
Milliman
Mutual of Omaha
Nationwide
Newport Group
Northwest Plan Services
OneAmerica
P&A Group
PAi
Paychex
PCS
Pensys
Pentegra
PNC*
Principal
Prudential
Securian
Security Benefit
Sentinel
Slavic 401k
Summit Benefit Solutions
Sunwest Pensions
T. Rowe Price
The Retirement Plan Company
TDM
The Standard
TIAA
Transamerica
Trautmann Maher
Ubiquity Retirement
Unified Trust
Valic
Vanguard
Voya
Wellington Trust
Wells Fargo

Enterprise iQ Partnership Models

RPAG will work with you organization to build a partnership that work specifically for your business structure. Whether you are a BD or RIA, have subsidiary BDs or OSJs, we have a solution for you.

- Enterprise iQ – Provides home office and sales desk with data aggregation, business oversight, powerful analytics and plan reporting capabilities
- Enterprise iQ & Advisor Portal – Enterprise iQ service (data aggregation, sales desk, oversight, etc), plus advisor access to the RPAG's Advisor Portal.
- Advisor Access Only – Access for every type of advisor (specialists and generalists) as well as sales desk and data analytics for home office.

For more information, contact Jesse Taylor at jesset@rpag.com or 949.305.3859 x16034.

RPAG Advisor Portal – powered by Advisor iQ

There's a big difference between a bunch of fragmented tools and a complete retirement practice solution. That difference fuels and advisor's level of success. Whether they run a large practice or are just starting out, RPAG has what your advisors need to thrive. As great as our technology is, we're a service company at our core. Advisors learn from experts who live and breathe the industry and have one shared goal: to make them the next retirement advisor success story.

Align every aspect of a retirement advisory practice with one, yes one, integrated practice management platform:

System

- RPAG Advisor Portal
- Fiduciary Briefcase
- Plan Asset Link
- PlanFees
- WellCents
- Larkspur Planisphere
- RFP Express

Reports

- Investment Scorecard
- Provider RFPs
- Provider Proposals
- Fiduciary Fitness
- TDF Analyzer
- Stable Value Analyzer
- Rollover Analyzer

Resources

- Resource Center
- Video Learning Center
- Newsletters & Memos
- Content Marketing
- Sales Support
- Conferences & Workshops

Custom Solutions

- Collective Trusts: Active, Passive, Asset Allocation
- Turnkey Solutions
- Financial Wellness
- Fiduciary Outsourcing

RPAG – The Premier Solution

RPAG™ is a leading provider of enterprise level technology built specifically for the retirement plan consulting industry. Through our suite of technology platforms, data integrations and high-level service, organizations are given the insight and intelligence to efficiently monitor and grow their retirement plan business.

Our Enterprise iQ dashboards provide Broker Dealers and large-RIAs with advanced metrics and reporting capability across all facets of their retirement plan channels. While our Advisor Portal, powered by Advisor iQ, provides premier technology, systems, training, resources, and custom solutions to qualified and non-qualified advisors.

RPAG members work with over 100,000 plan sponsors, more than 7 million participants with a collective $1 Trillion in plan assets (as of 9/1/22). For more information, visit rpag.com.

120 Vantis, Suite 400, Aliso Viejo, CA 92656 | 877.360.2480 | 949.305.3859 | rpag.com