



Premium Marketing

Professional marketing content for all of your sales and marketing initiatives

RPAG Premium Marketing

RPAG Premium Marketing provides professional marketing content to help promote your retirement plan business and communicate your value proposition.



Diverse

Diverse and steady
stream of content



Compelling

Compelling and
educational to drive
engagement



FINRA Reviewed

Saving you the time
and hassle of
compliance

Newsletters & Memos

Plan sponsors don't want to be "sold", they want thought-provoking education and value. RPAG's newsletters and memos provide just that.

Retirement Times

Monthly; 3-4 articles per issue; use your branding; FINRA reviewed; print, email and online versions

Participant Memos

Monthly; educational; use your brand or client's brand; FINRA reviewed

Fiduciary Hot Topics

Quarterly; use your own branding; focuses on timely fiduciary issues

Flyers & One Pagers

- Refresh of existing library of collateral pieces
- Use your own branding
- FINRA reviewed for headache-free compliance

Flyers

Investments
Benchmarking
Fiduciary Governance
3(21) & 3(38) Services
Fiduciary Briefcase
Company Overview
Financial Wellness

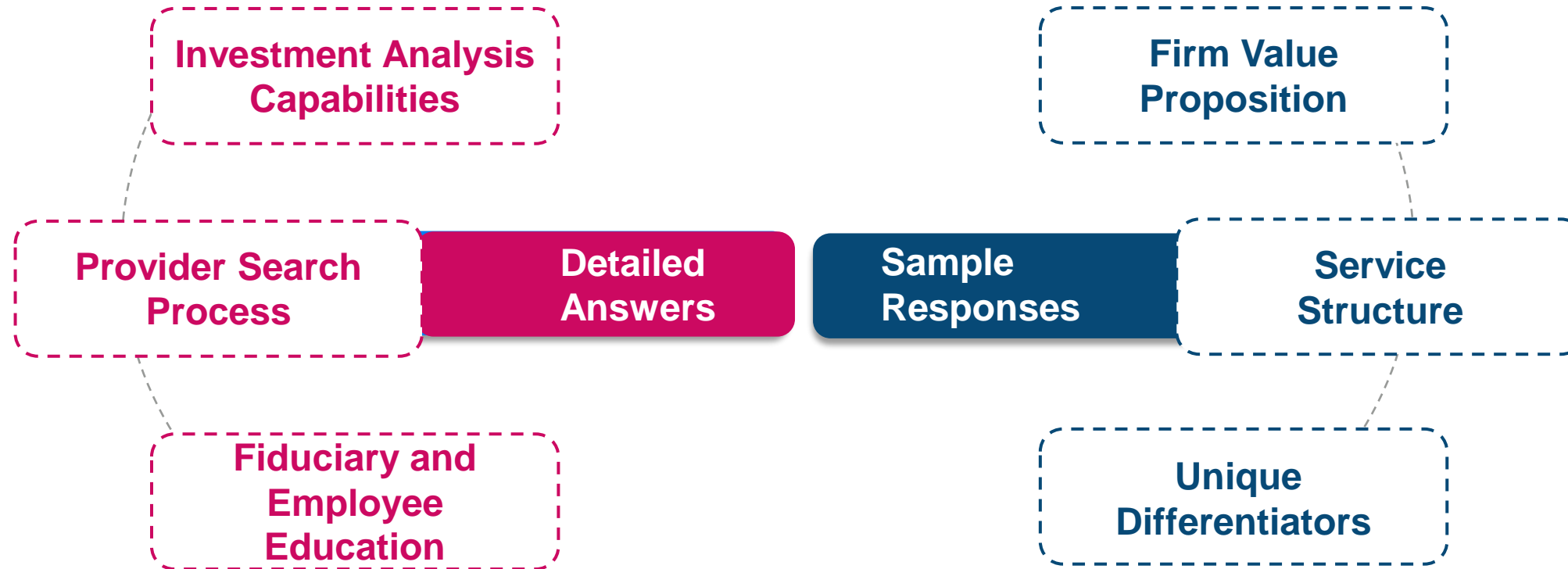
Commentaries

Courageous Plan Design
Participant Experience
Retirement Income
Brokerage Accounts
Specialty Funds
Financial Stress
Misfit Risk

Consultant RFP Responses

The Advisor RFP is no longer just for plans in the large and mega market. Plans as small as \$5 million are now using this in-depth and time-intensive process to select their retirement consultant. But not to worry, RPAG has you covered!

Our RFP team has responded to over 600 RFPs in the past 10 years, and we know what it takes to communicate the value of the RPAG consulting methodologies. Our process leads to more finalist meetings and more sales.



Social Media Posting Calendar

With so much content to manage, it can become daunting to plan which content to share and distribute... and when? Our customizable Social Media Posting Calendar will allow you to organize your social media activities far in advance in order to make your social marketing more manageable.

The easy-to-use PowerPoint template helps you plan your updates, ensuring that your brand is staying in front of your network.

- Customizable spreadsheet
- Quarterly update from RPAG
 - Links to retirementtimesnewsletter.com blog posts
 - Example tweets/posts
- ChatGPT Prompt Section
- Color coding for different types of content

Social Media Posting Calendar
May 2022

SU	M	TU	W	TH	F	SA
5/1	5/2 Market Monday	5/3 Blog Post Post link to Social Media(s)	5/4 Wellness Wednesday	5/5 Drip Email (or long-form LinkedIn post)	5/6 Fun Friday	5/7
5/8	5/9 Market Monday	5/10 Blog Post Post link to Social Media(s)	5/11 Wellness Wednesday	5/12 Drip Email (or long-form LinkedIn post)	5/13 Fun Friday	5/14
5/15	5/16 Market Monday	5/17 Blog Post Post link to Social Media(s)	5/18 Wellness Wednesday	5/19 Drip Email (or long-form LinkedIn post)	5/20 Fun Friday	5/21
5/22	5/23 Host Virtual Seminar (Promote 6 weeks ahead)	5/24 Blog Post Post link to Social Media(s)	5/25 Wellness Wednesday	5/26 Drip Email (or long-form LinkedIn post)	5/27 Fun Friday	5/28
5/29	5/30 Market Monday	5/31 Blog Post Post link to Social Media(s)				

Key

- Wellness Wednesday
- Market Monday
- Drip Email
- Webinar
- Blog Post
- Fun Friday Fact
- Virtual Seminar

Sales Pitch Deck

- Overview of Services
 - Sales pitch deck
 - Over 50 slides
 - More than 400 hours of development
 - FINRA-reviewed
- Additional resources
 - Supplemental slide deck
 - Introduction and finalist versions

Retirement Plan Consulting

Overview of Services

Investment Analysis

Logo: R P A G

Who We Are

Driven by robust technology, systems and services, RPAG financial professionals have a unique ability to help create successful retirement plan outcomes for plan sponsors and participants alike.

MOST ADVISORS

RPAG FINANCIAL PROFESSIONALS

Fiduciary Compliance

Fiduciary Fitness Program™

Initially, we will conduct a Fiduciary Diagnostic on your plan that will be used to identify any potential existing gaps pertaining to your committee's fiduciary responsibilities. Your plan's Fiduciary Diagnostic is then reviewed and updated on a regular basis to identify upcoming plan management responsibilities and to document when required tasks are completed. Our Fiduciary Education Modules provide the necessary resources to help inform and educate committee members regarding ERISA's fiduciary requirements.

Fiduciary Education Modules		
Fiduciary Overview	Maintaining Your Fiduciary File	404a-5 Disclosure Regulations
Fiduciary Responsibilities	Investing in Employer Securities	Controlled Groups
Fiduciary Liabilities	Minimizing Risk Strategies	Mergers & Acquisitions
Selecting Service Providers	Claims & Appeals Procedures	Timely Deposits
Fees & Expenses	Participant Experience	Elective Contributions
Selecting Investments	Prohibited Transactions	TDF Selection
ERISA 404(a) & 404(c)	408(b)(2) Disclosure Regulations	DOMA

Investment Due Diligence

Our Approach

Our approach combines sophisticated, institutional measurement techniques with a proprietary 10-point pass/fail scoring process. We break down what we believe to be the individual elements of success that distinguish superior investment managers within a particular asset class.

Our Analysis

Our analysis begins with creating a custom benchmark index that explains a fund's market-related and style-related investment returns so that any unexplained variance can be attributed to manager skill. 36-month rolling return intervals are also utilized to provide better measures of central tendency and to improve our ability to identify trends.

The Score

A fund's score reflects a manager's skill within a particular asset class. 60% of a fund's score is tied to style-specific benchmarks. 20% of a fund's score is tied to custom peer group comparisons, and 20% of a fund's score is qualitative.

Webinar Kits

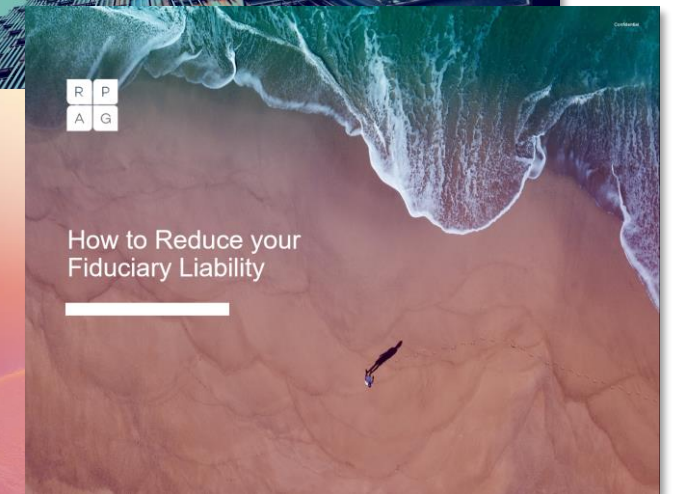
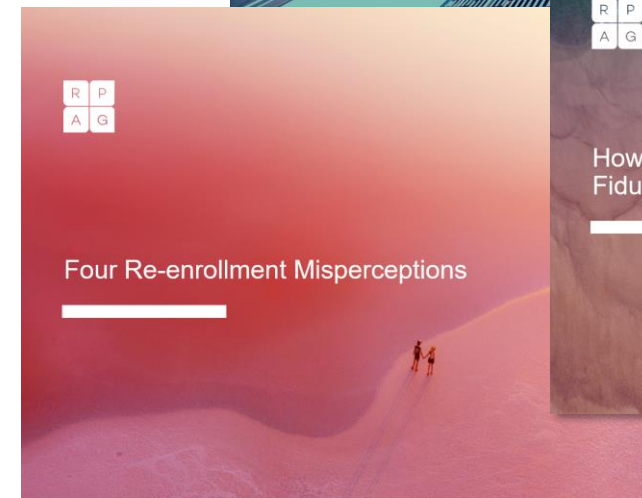
Hosting engaging, live and online events is instrumental to a successful marketing campaign. You need professional and effective presentations to retain loyal clients as well as turn prospects into those loyal clients.

These kits include:

- A FINRA-reviewed invitation
- Topical presentation deck
- FINRA Letter

Perks:

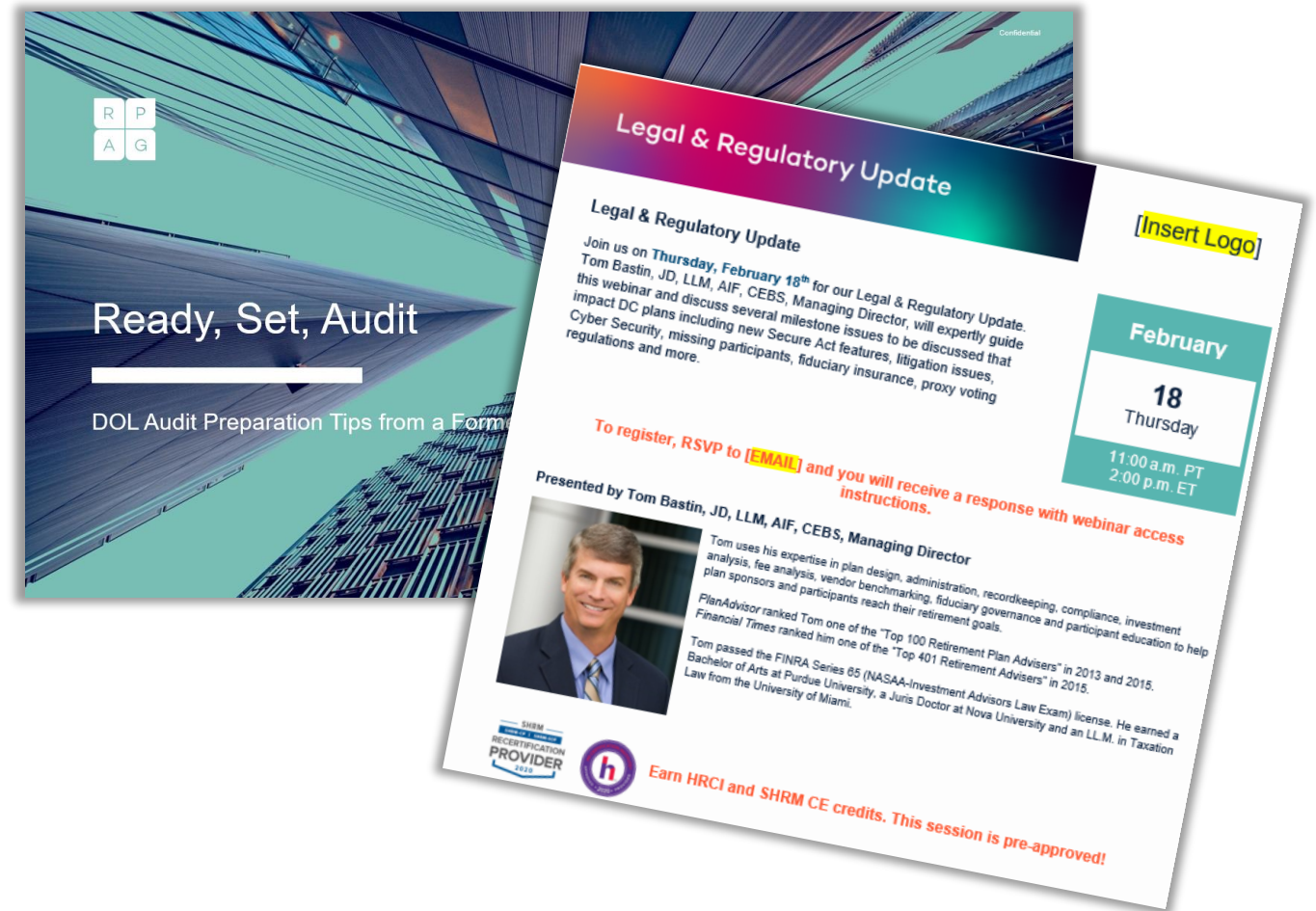
- Everything is ready for you to host
- No content is needed from your end
- Qualifies for HRCI and SHRM CE credits
- Can be customized with your branding
 - Use the “Slide Master” feature under the “View” tab of your PowerPoint Menu



Hosted Webinars

Bring value to your clients and prospects and let us take the administrative burdens off your plate

- 4 hosted webinars per year
 - 4x Legal & Compliance
- We provide
 - The presentation
 - The invitation
 - Follow-up process
 - Let you know if your customers attended
 - Link to recording
- FINRA-reviewed
- CE credits
- Saves you time!

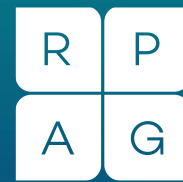


Premium Marketing Services

**RPAG
Member
Package**

**W/
Premium
Marketing**

Plan Sponsor Newsletters	Monthly	Monthly
Participant Memos	Monthly	Monthly
Flyers/One Pagers	10+	10+
Sales Pitch Deck	Basic	Expanded
Consultant RFP Responses	N/A	Yes
Social Media Posting Calendar	N/A	Yes
Drip Email Templates	N/A	8-10/year
Plan Sponsor Presentations	N/A	8-10/year
Hosted Webinars	N/A	4/year
	Included with RPAG membership	\$300/quarter



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