



# Provider Analysis Live-Bid RFP System

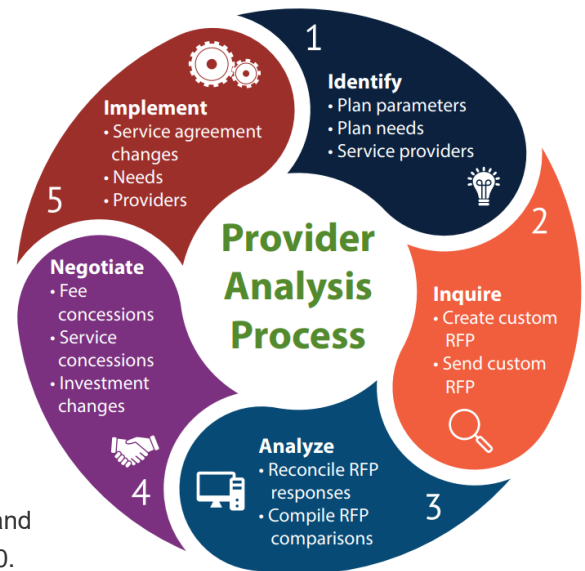
Selecting and monitoring service providers is one of the most important duties that retirement plan sponsors and fiduciaries must make.

ERISA Section 404(a) states that plan fiduciaries must determine, and document reasonableness of plan fees and case law has clearly identified that this is most prudently accomplished through a robust “live bid” process every three to five years, or sooner if plan characteristics change substantially or a provider change is needed.

RPAG’s Provider Analysis live-bid recordkeeper RFP system helps advisors streamline the provider search process by allowing creating an apples-to-apples comparison of a plans fees, investments, and services against alternative providers in a robust and easy to present report. The reports can compare over 500 data points on recordkeeping, administration, all fees, revenue sharing, technology services, compliance, investment management, employee communications and so much more!

## Key Attributes

- RPAG’s Provider Analysis system receives over 15,000 live pricing quotes from service providers and produces over 4,000 benchmarking reports every year.
- On an annual basis, RPAG’s RFP Team collects updates from 100+ providers to ensure current data is maintained in its proprietary Provider Analysis database.
- The final report output includes 500+ data points in key areas including recordkeeping, investment management, compliance services, employee education and technology.
- A Total Cost Analysis shows bottom-line dollar amounts of incumbent and bidding providers and includes revenue sharing analysis for full fee transparency.
- RPAG’s Provider Analysis services can be applied to 401(k), 403(b), 457 and non-Qualified plans ranging from under \$1,000,000 to over \$1,000,000,000.



For more information about RPAG’s Provider Analysis, please contact [support@rpag.com](mailto:support@rpag.com) or call 949-305-3859.