



RPAG Update

Nick Della Vedova, President

20TH ANNIVERSARY



LEVERAGE SCALE

152,000 of Plans

\$1.6 Trillion AUI





BUILT BY ADVISORS FOR ADVISORS

PRACTICE MANAGEMENT PLATFORM

- Training and Support
- Technology
- Leveraged Scale



GROWTH

TRAINING AND SUPPORT



Veronica Lee

Chief Relations Officer



Alexis Patenaude

Advisor Service Associate



Carlos Peñaloza

Relationship Manager

TRAINING AND SUPPORT



8,000+ emails
responded to



5,000+
phone calls



95% of ERISA questions
answered in 24 hours

TRAINING

Your advisory teams are growing...

WE ARE HERE TO HELP

RPAG UNIVERSITY

Our own management learning system
2-3-minute videos everything RPAG

CONFERENCES = COLLABORATION



Spring Summits



National Conference



Advisory Council



Partner Workshops



2025 RPAG SPRING SUMMITS

Chicago, Philadelphia, Dallas, Charlotte, Aliso Viejo

New Partner Workshops: 1st, Capital Group, Los Angeles

TECHNOLOGY

RPAG INVESTMENT

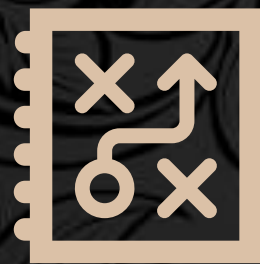
\$45 Million



“Built by advisors
for advisors”



Creating greater output
and extreme efficiencies



Seasoned
Technology Team

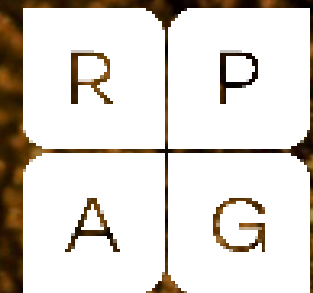


Enhanced
Internal
Processes



Worldwide
Partners





INITIATIVES

- Continue innovating platform
- Enhance member relationships
- Strengthen connectivity with partners



UPDATE



LAS VEGAS



**SANTA ANA
FEDERAL COURTHOUSE**



**LOS ANGELES
FEDERAL COURTHOUSE**

WE WON LAUDERDALE

MILLS - WON AT TRIAL

Plaintiffs have asked for reconsideration

“The Fit Analysis was consistent with DOL TDF Guidance”

FIT ANALYSIS REFERENCED OVER 10 TIMES IN THE SUMMARY.

“flexPATH’s process involved, among other things, analyzing participant data of the merging plans, conducting the fit analysis to determine an appropriate glidepath risk level for QDIA...”

“...in selecting funds for a retirement plan, it is objectively reasonable for fiduciaries to select a fund that among its other attributes, is expected to reduce risk of severe loss in down markets.”

“Where a business has competed fairly and ethically, it cannot be faulted for succeeding.”

THANK YOU



SEAN MURPHY



MATT LAROCHE



CATALINA VERGARA

22,488

PLANS USE ONE OF YOUR CITS

TOTAL CIT GROWTH

(IN BILLIONS)



INVESTMENT COUNCIL

INVESTMENT COUNCIL LEADERSHIP



Jeff Elvander
CIO



Matt Giovinazzo
Dir. Investment Management



Kellen Foley
Dir. Investment Management

INCOME

MANAGED
ACCOUNTS

MORE

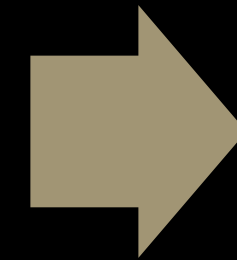


INCOME

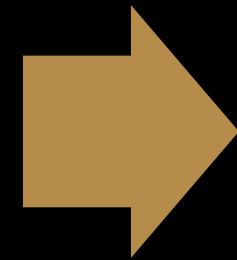


MANAGED ACCOUNTS

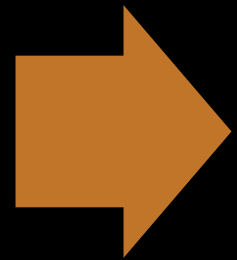
flexPATH 3(38)



Marketing Agreement



Revenue



Disclosure

NEW 2024 CIT OFFERINGS



	Small Cap Growth III (Voya Small Cap Growth)	Mid Cap Value II (Allspring Special MCV)	Emerging Markets II (BlackRock Emerging Mkts)	Core Plus Bond III (Fidelity Total Bond)
Score	9	10	10	10
Expense	0.58%	0.45%	0.62%	0.25%
Savings	31%	36%	29%	17%

CIT GROWTH ON THE HORIZON



	Stable Value II (Principal)	US REIT (Principal)	American Funds Washington Mutual	American Funds High-Income Trust
Score	-	-	7	10
Expense	0.10%	0.52%	TBD	TBD
Savings	70%	36%	-	-

TDF CIT GROWTH ON THE HORIZON



	American Funds TDF Series	RetirePilot Fidelity Blend	Putnam Retirement Advantage Income	SmartGoal by J.P. Morgan
Score	9	-	-	-
Expense	0.30%	TBD	0.35%	0.16%
Savings	9%	-	-	-

 **flexPATH**[®] TDFs
STRATEGIES

 **flexPATH Index**
POWERED BY **flexPATH**[®]

and

 **flexPATH Index+**
POWERED BY **flexPATH**[®]

flexPATH[®] STRATEGIES TDFs

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flexPATH Index+
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RETIREMENT[™]

VOYA
FINANCIAL[™]

Nationwide[®]

Principal[®]

T.Rowe Price

My Retirement Path

My Compass Index

Flex Focus

RetirePilot

IndexSelect

My Compass

ManageForMe
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CAPITAL GROUP[®] | AMERICAN FUNDS[®]

SmartGoal

RetirePilot Fidelity Blend

TIAA

ONEAMERICA[®]

Fidelity
INVESTMENTS[®]

CAPITAL GROUP[®] | AMERICAN FUNDS[®]

Great Gray American Funds
Income Series

Target Income Portfolios

Retirement Track

flexFIT+

IndexSelect
Income Series

CAPITAL GROUP[®] | AMERICAN FUNDS[®]

CAPITAL GROUP[®] | AMERICAN FUNDS[®]

Putnam Retirement
Advantage Income

CITs FEATURE BEST-IN-CLASS MANAGERS

		U.S. Equity				
		Value	Blend	Growth		
Large					Large	
Small					Small	

		Int'l Equity				
		Value	Blend	Growth		
Large					Large	
		Emerging Markets				
					Fixed Income	

	Stable Value
	ESG Balance
	US REIT
	Cash Balance

FLEXPATH RESOURCES



Kellen Foley

Dir. Investment Management



Matt Giovinazzo

Dir. Investment Management



Alex Khan

Sr. Investment Advisor



Jonathan Coombs

Sr. Investment Advisor



Ellie Armstrong

Investment Analyst



KC Chiravanich

Investment Analyst

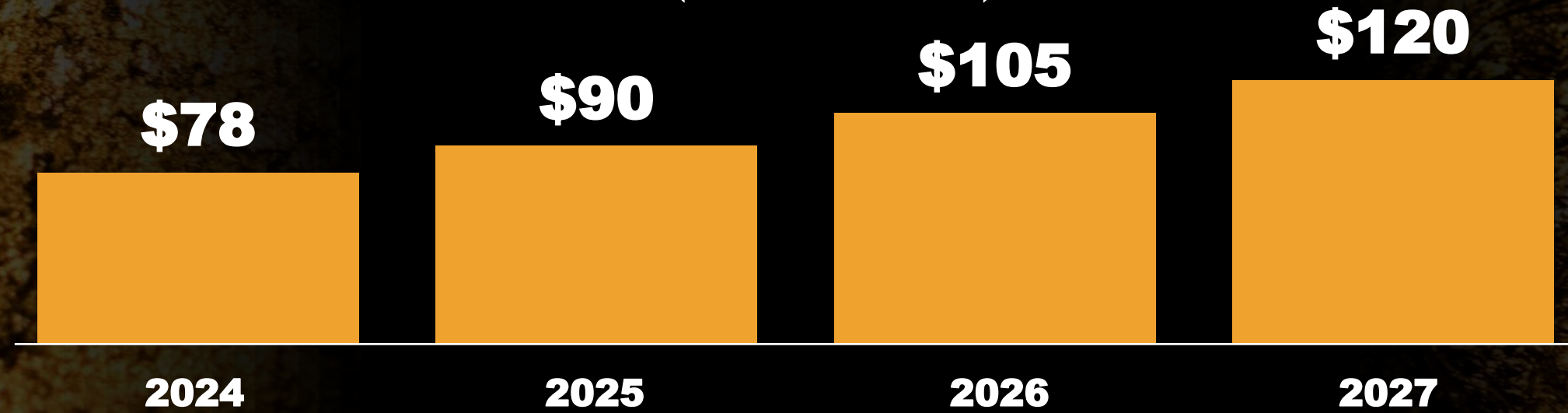


Reese Wong

Investment Analyst

TOTAL CUSTOM SOLUTIONS CIT GROWTH

(in billions)







 **RPAG**

LEVERAGE SCALE

152,000 of Plans

\$1.6 Trillion AUI

