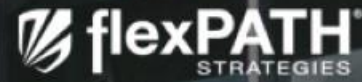
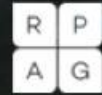


RPAG Update

A wide-angle photograph of a snowy mountain slope under a clear blue sky. A person in a blue jacket and orange pants is snowboarding down the slope, leaving a trail of snow behind them. The snow is bright white and shows signs of being tracked. The sky is a deep, clear blue.

Nick Della Vedova
President



Structural Update

BEFORE



AFTER

 RPAG +  flexPATH[®]
STRATEGIES



INNOVATION & EXECUTION

INNOVATION & EXECUTION



Vince Giovinazzo
CEO



Nick Della Vedova
President



Veronica Lee
CRO




Jami Chapman
COO



Jesse Taylor
SVP, Business Development



Jeff Elvander
CIO

A person wearing an Oculus VR headset is shown in profile, looking towards a digital dashboard. The dashboard displays several key performance indicators (KPIs) for digital marketing, including CTR, Cost per conversion, and Quality Score, each with a corresponding line graph showing trends over time. The text "TECHNOLOGY + INVESTMENTS" is overlaid in large, bold, white letters across the center of the image.

TECHNOLOGY + INVESTMENTS

Oculus

CTR
14.6
↑ 10.6%

1.87
↑ 0.2%

Cost per conversion
673.27
↑ 0.2%

Quality Score
9.38
↓ -0.1%

Mission Statement



Retirement Plan Advisory Group (RPAG) is a consulting firm that inspires advisors to reach their highest potential. Integrity, transparency, and the highest ethical standards drive our actions and behavior. Our commitment to excellence and innovation allows us to anticipate the changing retirement plan landscape and regulatory environment. As a result, our platform allows advisors to create successful retirement plan outcomes by protecting plan fiduciaries and engaging plan participants to reach their retirement income potential.



**“Inspires advisors to reach
their highest potential”**







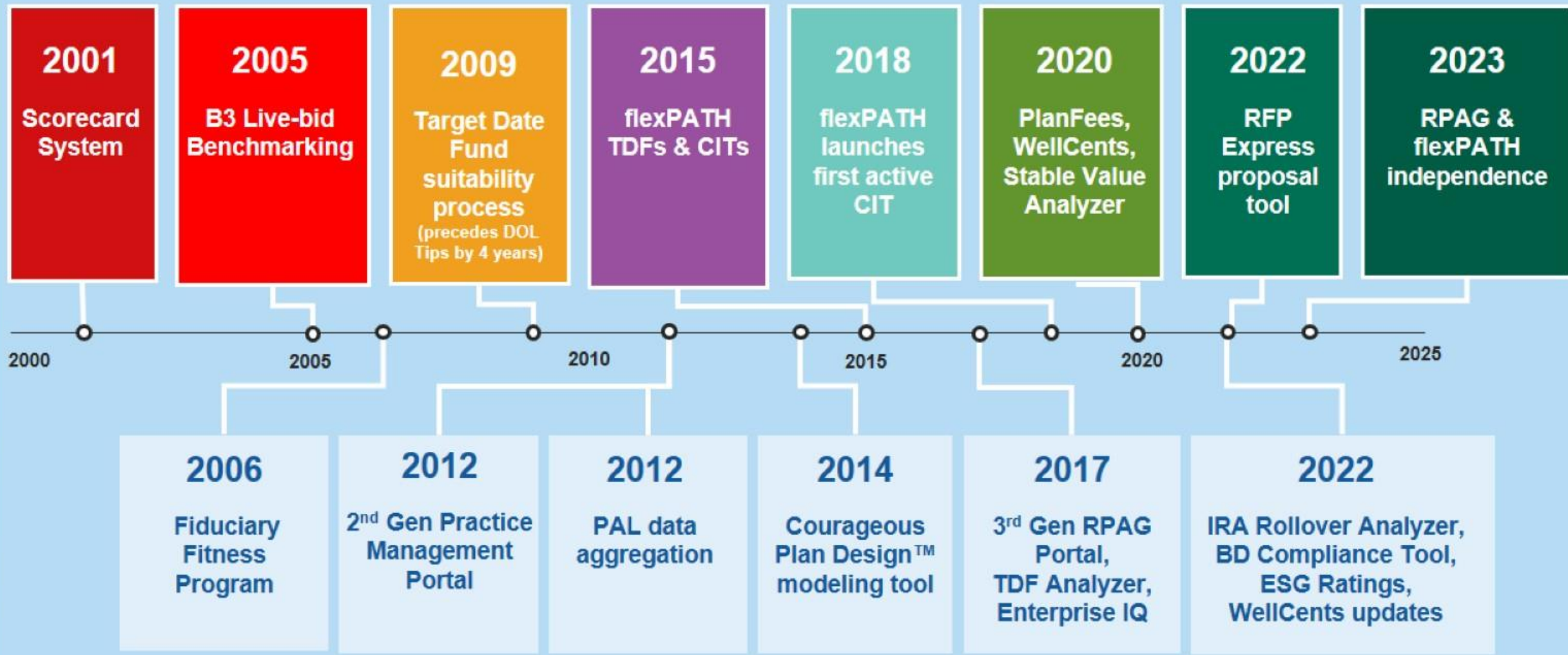
**“Integrity, transparency,
and the highest ethical
standards drive our
actions and behavior”**







"Our commitment to excellence and innovation allows us to anticipate the changing retirement plan landscape and regulatory environment"





"As a result, our platform allows advisors to create successful retirement plan outcomes by protecting plan fiduciaries and engaging plan participants to reach their retirement income potential"



\$1.25
Trillion

120,000
Plans

10M
Participants

A person wearing a red helmet and dark tactical gear stands at the open rear hatch of a military aircraft. They are looking out over a vast landscape of white clouds and a patchwork of green and brown fields below. The interior of the aircraft is visible, showing rivets and structural panels. The word "INITIATIVES" is overlaid in large, white, bold, sans-serif capital letters across the center of the image.

INITIATIVES

\$40 Million ?



**\$40
Million**

=

**RPAG
investment
technology**



Multiplier Effect

$$\text{\$40 Million} = \left(\text{RPAG investment technology} \right)^2 \times \text{\$80M}$$



**\$5
Million**

RFP Express



RFP Express

Provider Analysis and Benchmarking

PREPARED FOR:

ABC Company

January 24, 2022



Advisor Name
FIRM NAME
email@email.com
555-555-5555

Sample disclosure language will go here. Sample disclosure language will go here. Sample disclosure language will go here. Sample disclosure language will go here. Sample disclosure language will go here. Sample disclosure language will go here. Sample disclosure language will go here. Sample disclosure language will go here. Sample disclosure language will go here. Sample disclosure language will go here.

Service Provider Comparison



	VOYA	Principal	EMPOWER	Nationwide
\$8 B	\$204 B	\$1,000 B	\$2,400 B	
\$8 M	3.50 M	12.07 M	23.43 M	
1,389	26,386	65,009	24,349	
5,365	\$54,000	\$87,393	\$91,400	
Proprietary	Proprietary	Proprietary	Proprietary	
Public	Public	Public	Public	
1,826	\$23,003	47,219	9,632	
273	1,586	6,625	4,241	
30 M	\$5.80 M	\$13.34 M	\$8.60 M	
293	71	254	86	
96	52	123	60	
15	20	75	45	

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Service Provider Summary



	Current Provider	Voya	Principal	Empower	Nationwide
Product Name	PRODUCT	Signature	FiduciaryPATH Exchange	NFPep	Fidelity Advisor
Type	TRADITIONAL	Traditional	Exchange	PEP	Exchange
TPA	TPA NAME	Pentegra	FuturePlan	Pentegra	NA
3(16) Administrative Fiduciary	NA	NA	FuturePlan	Flexible	Flexible
Investment Fiduciary	NA	3(21) ABC Advisory LLC	3(38) FiduciaryPATH	3(38) FiduciaryPATH	3(38) FiduciaryPATH
Pooled Plan Provider*****	NA	NA	NA	Pentegra	NA



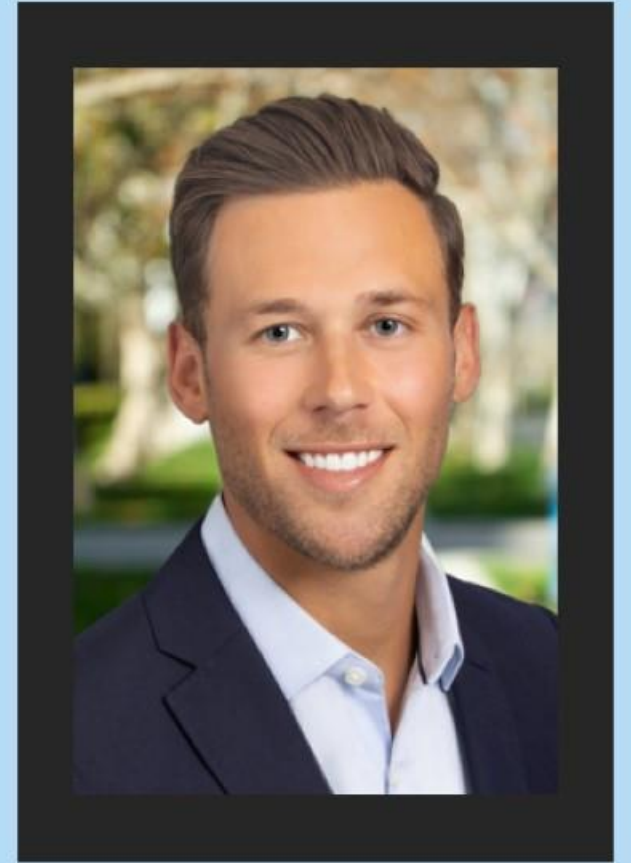
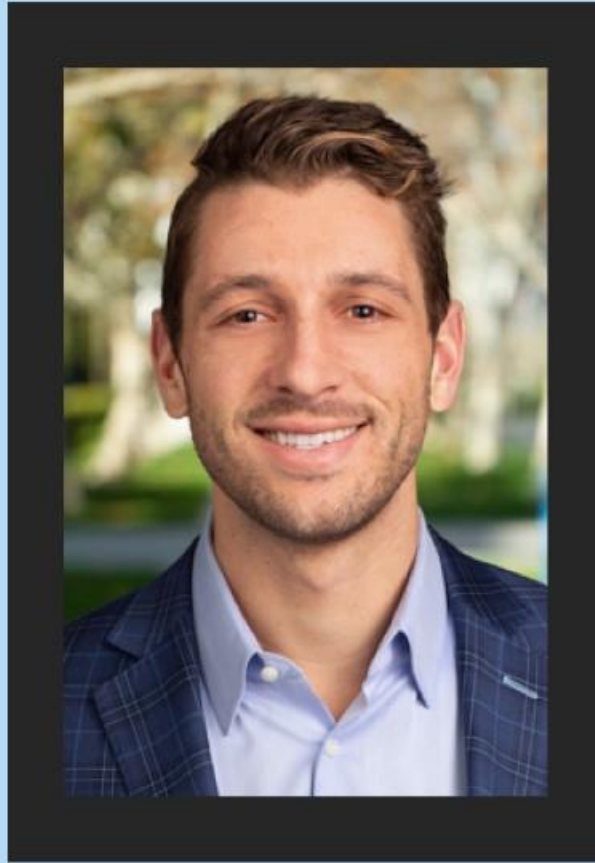
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RPAG Advisory Council Coming Soon!

Led by:



Investment Council





INVESTMENT INNOVATION

The State of the Target-Date Market: 2023, Sway Research Report

Largest

Multi-Glidepath TDF Manager
(89% market share)

3rd

Largest Multi-Manager
TDF Manager

6th

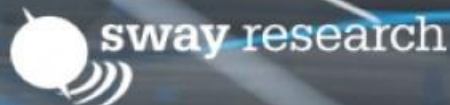
Largest Passive
TDF Manager

7th

Largest Blend
TDF Manager

Fastest Growing

TDF Manager over 3 years with 31% average
annual growth in AUM



Total Custom Solutions CIT Growth (in billions)

14,879

Plans use a flexPATH solution



flexPATH[®] STRATEGIES

Index & Index+



New 2023 CIT Offerings

J.P.Morgan
Asset Management

J.P.Morgan
Asset Management

Janus Henderson
INVESTORS

Allspring

NEUBERGER BERMAN

	Large Cap Value III (JPM US Value)	Large Cap Growth II (JPMorgan LCG)	Mid Cap Growth II (Janus Enterprise)	Mid Cap Value II (Allspring Special MCV)	Small Cap Growth (NB Small Cap Growth)
Score	10	10	9	10	10
Expense	0.40%	0.39%	0.48%	TBD	0.58%
Savings	9%	13%	27%	-	28%

VOYA
FINANCIAL

CAPITAL GROUP* | **AMERICAN FUNDS***

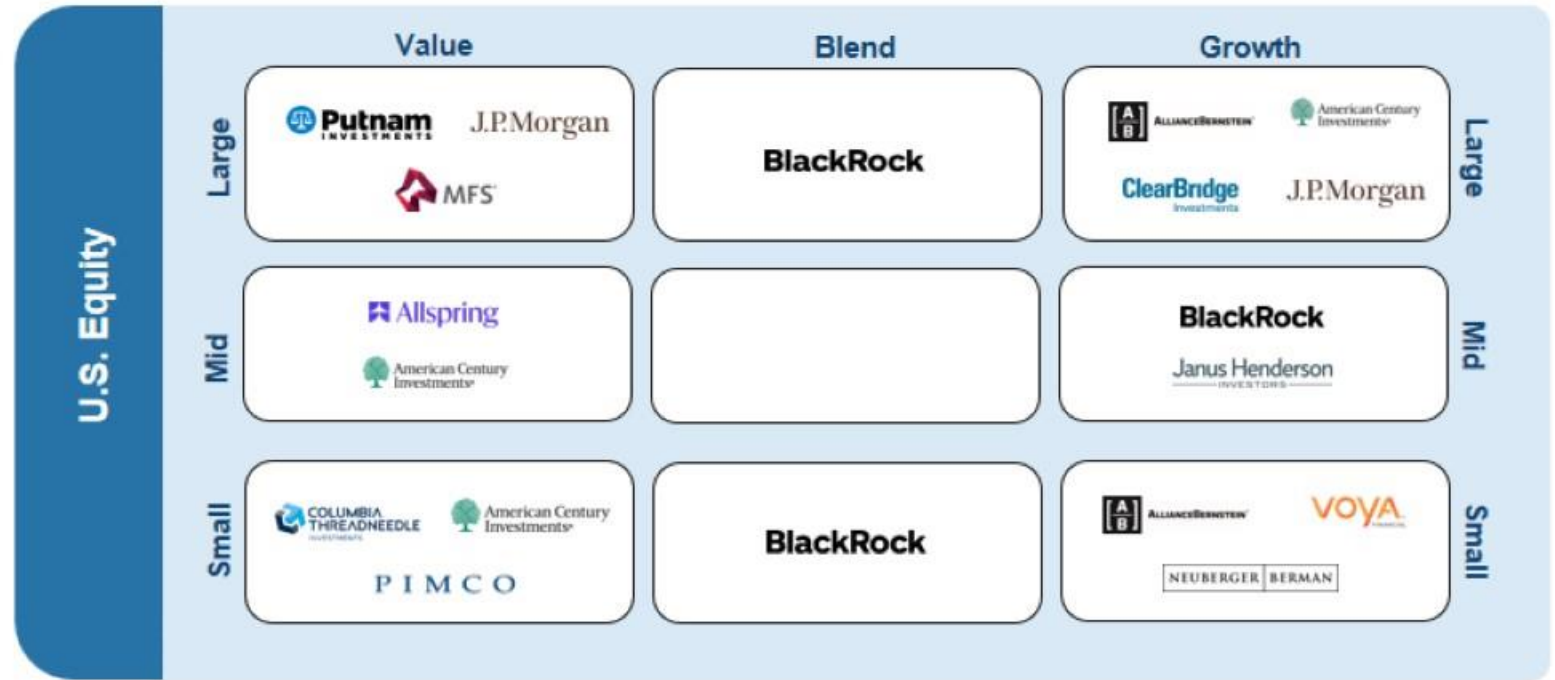
BlackRock

Principal

	Small Cap Growth III (Voya Small Cap Growth)	GG EuroPacific Growth Trust (American Funds EuroPac)	Emerging Markets II (BlackRock Emerging Mkts)
Score	10	8	10
Expense	0.58%	0.41%	0.62%
Savings	32%	13%	24%

	RetirePilot TDF
Score	9.6
Expense	0.15%
Style	Passive with SV

flexPATH Features Best-in-Class Managers



CIT Growth on the Horizon

NEUBERGER BERMAN

VOYA
FINANCIAL

	Small Cap Growth (Neuberger Berman)	Small Cap Growth (Voya)
Score	10	10
Expense	0.58%	0.58%
Savings	28%	32%

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



Alec Melosini

Investment Analyst

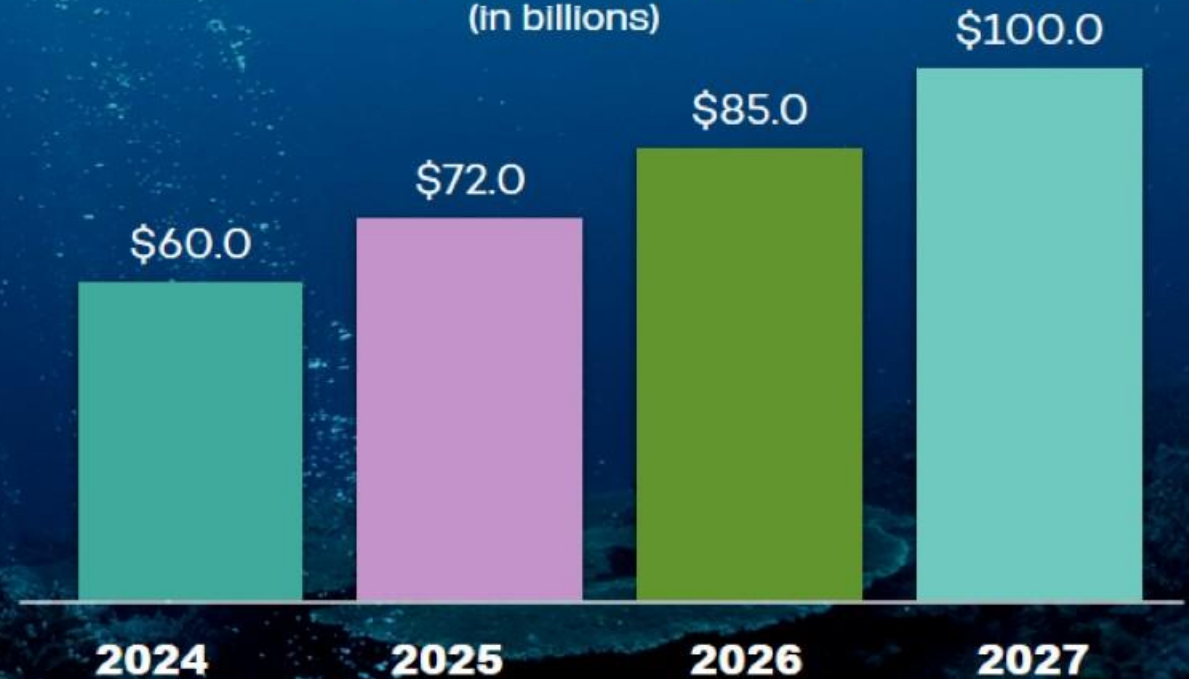


Initiatives

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

Total Custom Solutions CIT Growth

(in billions)



**Unlock Your
Potential**





△ LIMITLESS