

Plan Asset Link (PAL)

Creating operational efficiencies through PAL

Plan Asset Link (PAL) is a process in which plan-level data is synced between recordkeepers and the RPAG Advisor Portål. This saves advisors countless hours of work by removing the laborious process of pulling plan lineup and asset information from recordkeepers' websites and manually entering all the data into the RPAG Portal. PAL provides the capability for plan lineups and asset balances to be synced on a monthly or quarterly basis, depending on the recordkeeper, to give you accurate, up-to-date, and efficient information.

PAL Process

1. Consent Forms

Download the consent form for your client's recordkeeper. These consent forms are stored on the RPAG Resource Center in the Plan Asset Link folder. Fill out the necessary information and have your client sign the form. Some advisors prefer to use an electronic signature service for these forms but bringing the consent form to a client meeting can often be the most effective way to get these signed.

2. Send Consent Forms to RPAG

Once your client has signed the appropriate consent form, send the executed form to <u>PAL@rpag.com</u>. The PAL Concierge Team will then process the form and work with the recordkeeper to establish the PAL data feed. Make sure that you have entered the accurate client contract ID number into the Plan Details section so the data feed from the provider can link to the correct plan.

3. Accept the PAL Data Feeds

PAL data feeds are linked within two weeks of the month or quarter end, depending on the provider. RPAG tracks and confirms each individual plan feed to ensure receipt by the advisor and will follow up with recordkeepers in the event of missing data. Before you run a report through RPAG, check the PAL feed status in the Plan Details section or on the Manage PAL Feeds page. Once you select the plan that you want to update, go through the PAL data syncing process.

New to PAL? Get trained by our PAL Concierge Team!

Our PAL Concierge Team is happy to walk you and your team through this entire process so that you can link all of your PALeligible plans. They have already helped countless advisors save time and be more efficient. Don't hesitate to contact them at <u>PAL@rpag.com</u> to begin your training today!

PAL Providers

Below is a list of providers that are participating in PAL. Different providers have different capabilities in regard to the timing of the feeds as well as the type of data that is sent through PAL.

Updated Q4 2022

Alerus Monthly Function Alliance Benefit Group Monthly Eligible for plans on the Eidelity and Schwab platforms only American Funds Monthly Only includes PlanPremier, PlanPremier TPA, RKDirect platforms; Excludes employer sponsored IRA. American Funds Monthly Plan data provided by Matrix or Mid-Atlantic Trust Ascensus Monthly Does not include investment options with \$0 in assets Billings & Company Monthly Plan data provided by Matrix CDM Retirement Monthly Plan data provided by Matrix Charles Schwab Monthly Plan data provided by Matrix Correll & Company Monthly Plan data provided by Matrix CUNA Mutual Monthly Plan data provided by Matrix Employee Fiduciary Monthly Plan data provided by Matrix CUNA Mutual Monthly Does not include investment options with \$0 in assets Employee Fiduciary Monthl	Provider	Feed Type	Notes		
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Does not accept DocuSign, consent form must have a wet signature.	Nationwide	Monthly			
Newport Group Monthly Includes old Daily Access and Verisight plans, which have separate consent forms.	Newport Group	Monthly	Includes old Daily Access and Verisight plans, which have separate consent forms.		
OneAmerica Monthly Does not include ESOP or City National Bank (OARS SD); Includes old BMO platform (now OARS WI)	OneAmerica	Monthly			
P&A Group Monthly	P&A Group	Monthly			

Provider	Feed Type	Notes
PAi	Monthly	Does not include \$0 investment options
Paychex	Monthly	Does not include \$0 investment options if no enrollees
PCS	Monthly	Includes former Aspire plans
Principal	Monthly	Does not include non-qualified plans
Prudential	Monthly	Does not include DB plans
Randall-Hurley	Monthly	
Retirement Plan Consultants	Monthly	
Securian	Monthly	
Sentinel	Monthly	
Slavic 401k	Monthly	Plan data provided by Matrix
Summit Benefit Solutions	Monthly	
Sunwest Pensions	Monthly	
T. Rowe Price	Monthly	
The Retirement Plan	Monthly	
Company	Wontiny	
The Standard	Monthly	
ΤΙΑΑ	Monthly	
Transamerica	Monthly	Does not include active funds with zero assets
Trautmann Maher	Monthly	
(Northwest Plan Services)	Wontiny	Does not include investment options with \$0 in assets
Tri-Ad	Monthly	
Ubiquity Retirement	Monthly	Plan data provided by Matrix.
Unified Trust	Monthly	
Vanguard	Monthly	Retirement Plan Access (Ascensus platform) only
Vestwell	Monthly	
Voya	Monthly	

If there is a provider not listed above that you would like added, please have that provider contact <u>PAL@rpag.com</u>. Additionally, we encourage you to reach out to your recordkeeper contacts and request that they participate in the RPAG PAL service.

Recordkeepers that could report to...

AMI Benefit Administrators Alliance Pension Consultants, LLC Austin Capital Retirement Plan Services American Trust Retirement California Pensions AMI Benefit Plan Administrators, Inc. Constellation Trust AMI Custodial 403(b) Accounts Correll and Company APA Benefits CPI-Qualified Plans CMG Aris Corporation CUNA FutureBenefits of America LLC CUNA Mutual Insurance Society Heritage Pension Advisors, LLC Digital Retirement Solutions Human Interest Employee Fiduciary Corporation Leading Retirement Solutions EPIC MutualBank Corne Datk Company, Inc Patilio, Brown & Hill, LLP LT Trust - CRS Pension Retirement Online, Inc. (PRO Inc.) (401kDIRECT) P Park Administratore Services, Inc. Perising PenServ Plan Ser 403(B) RiversEdge Advanced Retirement Solutions, LLC PenServ Plan Ser 403(B) RiversEdge Advanced Retirement Solutions, LLC PenServ Plan Ser 403(B) Werntz & Associates Retirement Investment Administrators, Inc. RPG Consultants Retirement Plan Consultants-Relius Retirement Solutions, LLC PenServ Plan Services Inc. RPG Consultants Pentegra Werntz & Associates Retirement Plan Consultants-Relius Secount Retirement Plan	Matrix rks	Mid-Atlantic
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	TPP	
Vestwell	Ubiquity Retirement + Savings	
	Vestwell	

The below data points are included in PAL for some plans:

Provider	Advisor Comp	Plan Tax ID	Participant Count	Plan Type
Alerus	\checkmark	\checkmark	✓	
American Funds	✓	✓	✓	
Ameritas	✓	✓	\checkmark	
Equitable (AXA)		✓	√	✓
BPAS	✓		\checkmark	
Empower	√	✓		
July Business Services			√	
Lincoln	√	✓	√	✓
Matrix		✓		
Newport Group		✓		
OneAmerica	\checkmark		√	
Paychex		✓		

Provider	Advisor Comp	Plan Tax ID	Participant Count	Plan Type
PCS Capital		✓	✓	
Securian	✓	✓	✓	✓
The Standard		✓		
Transamerica	\checkmark	✓	√	
Vestwell	\checkmark	\checkmark	✓	
Voya		\checkmark	✓	

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