RFP Express

Creating Fee Benchmarking Efficiencies Through Instant Results

RFP Express is our newest reporting option in the RPAG Fee Benchmarking Suite! We have built recordkeeper integrations to obtain Instant Quotes and rapid Custom Quotes based on a simplified set of current plan demographics and pricing parameters determined by our participating recordkeepers. This saves advisors countless hours of work by removing the arduous process of requesting proposals through a manual process by using a simplified workflow from our existing Provider Analysis tool. Designed to have you start your requests for proposals within minutes and having recordkeeper pricing back instantly when it's a match to their pricing parameters or responses the next day for custom quotes. The goal is to create access to accurate, up-to-date, and efficient provider quotes for client and prospect servicing needs!

RFP Express Process

1. **Start a Report**
   Select the RFP Express option from your Plan Cards in RPAG to begin the report for any Client or Prospect. Plan data if already set up will link to RFP Express or fill in a few data points to begin the report. If starting on a new Prospect, simply go directly to RFP Express from the Main Menu under Tools in RPAG.

2. **Select Providers and Quotes**
   Choose which participating providers you'd like to include in your quote. Try using the filters available to narrow down your providers based on various service and plan features. When pricing parameters of the requested plan fit those of the providers availability, an Instant Quote will be displayed immediately. For other products or those providers without an Instant Quote you can request a Custom Quote. These quotes are expected to be submitted within 24 hours and you will receive a notification when the provider has responded. Providers may have an opportunity to Refine their Instant Quotes and sharpen their pencil when they review the plan details. If a Provider chooses to refine their instant or custom quote, you will also receive an email notification.

3. **Generate Report**
   Including Instant Quotes only, your report is immediately ready to generate! Otherwise, once custom quotes have been submitted, your report will then be ready to generate. You'll finalize which providers and quotes you'll want to include and you will be ready to present your client deliverable. Your report includes a side-by-side comparison of the Provider Quotes and options to include current plan pricing and PlanFees Averages data for a Fee Analysis. Not to be missed is a Service Comparison of our RFP questionnaire to help differentiate providers and a one-pager on each included provider's introduction and value propositions.

New to RFP Express? Get trained by our Customer Success Team!
Our Customer Success Team is happy to help your team save time and be more efficient in your Provider Quote process. Don't hesitate to contact us at support@rpag.com to begin your training today!

Providers Available on RFP Express

Updated 11/15/2023

Instant Quote Providers	Plan Asset Thresholds	Available Platforms
Alerus Retirement and Benefits	Up to $50M or 250 participants	Alerus
American Funds	All Plans	RecordkeeperDirect R-6; PlanPremier R-6
Ascensus	All Plans	Ascensus Fee-Based; Newport Secure Retirement PEP
Empower	Up to $5M	Empower Standard; Empower Select; My Fiduciary Path; The 401K PEP
Equitable	Up to $11M	Retirement Vision
Fidelity	$1M - $10M; excluding start-ups	Fidelity
Mutual of Omaha	All Plans	Retirement Right Blueprint; GVA
Nationwide	Up to $15M	Flexible Advantage
NWPS	All Plans	NWPS
OneAmerica	Up to $10M	OneSolution; OneAlliance; Open Architecture NAV
Paychex	All Plans	Paychex
PenServ Plan Services, Inc.	All Plans	PenServ Plan Services
Sallus Retirement	Start-up 401(k) only	Sallus Retirement PEP
T. Rowe Price	Up to $5M	Essential Choice; Enterprise Choice; Focus Choice; Focus Choice Select; Tailored Choice
The Standard	Up to $2M	Group Annuity, NAV
Transamerica	All Plans; Up to $10M*	FiduciaryPATH Retirement Plan Exchange; Complete 401k Retirement Plan Exchange*; Partner Series; Director Series; FRE NAV Open Arch
Vanguard	All Plans	Vanguard Retirement Plan Access
Vestwell	Up to $5M	Vestwell Plus, Vestwell Recordkeeping Only; Vestwell Flex; Vestwell Workplace
Voya	Up to $10M	Framework; Map Select

Custom Quote Only Providers	Plan Types and Sizes	Available Platforms
Ameritas	All Plans	Ameritas NAV
Charles Schwab	$10M+	Core/Large Market
Cuna Mutual	All Plans	Custom
Principal	All Plans	PCRP; Principal Advantage

**Available to limited Broker Dealers only*

If there is a provider not listed above that you would like to see offered in the system, please contact support@rpag.com. Additionally, we encourage you to reach out to your recordkeeper contacts and request that they participate in the RPAG RFP Express benchmarking system!

New Launch Notes and Guide

- RFP Express is currently available for 401(k) plans and Start Up 401(k) plans! Look for additional plan types and providers as the system grows!
- Existing Plans are not eligible for Instant Quotes from the incumbent recordkeeper. Instant Quotes are for new business only. Rebids should be addressed through the plan's current contacts at that recordkeeper directly or through the Provider Analysis.
- Plan Pricing and Investment Expenses are based on the lineups in RFP Express. The proposed lineups capitalize on the exclusive access to RPAG members' CITs and flexPATH target date series. Pricing may be impacted by some providers based on changes to the lineups and allocations selected.
- Provider Quotes may only be available for fee-based advisor compensation. Commissions or Broker of Record compensation may alter their pricing and availability.

About RPAG

RPAG™ is an exclusive alliance of independent retirement advisors and institutions inspired to create successful outcomes by protecting plan fiduciaries and engaging plan participants. RPAG provides premier technology, systems, training, and resources to 2,000 member advisors that serve over 100,000 plan sponsors and more than $1 trillion in assets (as of September 1, 2022). Core practice areas include investment due diligence, RFP and fee benchmarking, fiduciary compliance, collective investment trusts, target date funds, 3(38) fiduciary outsourcing, intensive training, sales & marketing resources, and business consulting. For more information, visit rpag.com

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