We are RPAG.

PREMIER TECHNOLOGY, TRAINING AND RESOURCES FOR ELITE RETIREMENT PLAN ADVISORS

There's a big difference between a bunch of fragmented tools and a complete retirement practice solution. That difference fuels your level of success. Whether you run a large firm or are just starting out, RPAG has what you need to thrive. As great as our technology is, we're a service company at our core. Learn from experts who live and breathe the industry and have one shared goal: to make you the next retirement advisor success story.

We know exactly what it takes for you to run a successful retirement consulting practice.

RPAG is the logical outgrowth of NFP's Retirement division (formerly 401(k) Advisors). Founded in 2000 by Vince Giovinazzo with no outside funding and a vision of a better way to drive successful outcomes for plan sponsors and participants, we grew at an astonishing rate. Today, we are one of the largest independent retirement plan consulting firms in the U.S. with over $100 billion in assets under advisement.

We created Retirement Plan Advisory Group (RPAG) in 2004, and over a decade later, Vince and our incredible team of CFA® charterholders, ERISA experts, benchmarking specialists and plan consultants continue to help advisors drive business growth within a culture of integrity, trust and respect.

$250B
In Assets Under Influence

28K
Retirement Plans Served

425
Elite Member Firms

41
Broker-Dealers Represented by RPAG Advisors

Master your business with the RPAG Advisor Portal™.

RPAG gives you access to an extensive team of retirement plan experts that will help you drive growth at every stage of your retirement practice.

Align every aspect of your retirement practice with one, yes one, integrated practice management platform:

- *Sales & Marketing Support*
- *Investment Analysis*
- *Fee Benchmarking*
- *Plan Design*
- *Participant Education*
- *Fiduciary Education*
- *Financial Wellness Program*
- *ERISA Compliance*

R P A G

Log in and do. It's that easy. The RPAG Advisor Portal seamlessly connects the resources, systems and reporting you need.

Reports

- Scorecard System™
- B3 Provider Analysis™
- B1 Fee Benchmarking™
- Fiduciary Fitness Program™
- PLANavigator™
- Advisor Reports

Systems

- Fiduciary Briefcase™
- Plan Data Link™
- Compensation Benchmarking Calculator™
- Larkspur Planisphere
- Financial Wellness Program

Resources

- Resource Center
- Video Learning Center
- Newsletters & Memos
- Marketing Templates
- Prospecting Webinars
- Sales Support
- Conferences & Workshops

A wide range of training and support opportunities are available to you and your clients.

National Conference

- September: The Ritz-Carlton, Laguna Niguel
- RPAG pays for room, meals, snacks, drinks, etc.
- Best practices and case studies

Regional Spring Summits

- Orange County | San Francisco | Chicago | Atlanta Boston | Philadelphia
- Network with local and regional advisors
- Meet wholesalers

Technology Workshops

- Learn from RPAG technology and support experts
- Gain knowledge on how to be streamlined and efficient
- Small group setting promotes open dialogue

Live Phone & Email Support

- 25,000 emails and phone calls fielded annually
- Professional expertise for every facet of your business
- ERISA specialists, plan consultants and CFA® charterholders on staff

To learn more about how RPAG can help you grow your retirement business, contact 877.360.2480 or support@rpag.com.

RPAG-1606-02

120 Vantis, Suite 400, Aliso Viejo, CA 92656 | 877.360.2480 | 949.305.3859 | rpag.com