RPAG Platform Overview

PREMIER TECHNOLOGY, TRAINING AND RESOURCES FOR ELITE RETIREMENT PLAN ADVISORS AND INSTITUTIONS

At RPAG, we've built the industry's leading retirement plan practice management platform designed for advisors and institutions to create successful outcomes by protecting plan fiduciaries and engaging plan participants. Our efficient and scalable technology platform provides our members with actionable insights and allows them to make data-driven decisions for their retirement plan clients.

Our compelling client deliverables, and custom investment and turnkey solutions, give RPAG members a unique competitive advantage, all while surrounding them with world-class training and support.

RPAG has a proven track record of helping advisors grow their businesses using scale and efficiency.

$800B
In Assets Under Influence

80K
Retirement Plans Served

7M+
Participants Engaged

1
Integrated Platform

Master your business with RPAG.

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 & Prospecting
- Investment Analysis
- Fee Benchmarking
- Fiduciary Education
- Plan Design
- Data Aggregation
- Marketing Content
- Business Intelligence
- Practice Management
- Sales Coaching
- Financial Wellness Platform
- Small Plan Turnkey Solutions
- Custom CITs and TDFs
- Compensation Benchmarking
- Client Vault

The RPAG Advisor Portal seamlessly connects the resources, systems and reporting you need.

Technology

- RPAG Advisor Portal
- Scorecard System
- Fee Benchmarking
- Live Bid Provider RFPs
- Fiduciary Education
- Stable Value Analyzer
- TDF Analyzer
- Plan Asset Data Aggregation

Solutions

- Turnkey Fiduciary Solutions
- 3(21), 3(38) and 3(16)
- flexPATH Target Date Funds
- Active and Passive CITs
- WellCents Financial Wellness
- 5500 Search

Resources

- Resource Center
- Video Learning Center
- Newsletters & Memos
- Content Marketing Plan
- Social Media Coaching
- Sales Support
- Conferences & Workshops

We support you and your firm with best-in-class customer support and extensive training programs.

National Conference

- September 2021 Conference
- Three-day event with 30+ breakouts
- Best practices, sales strategies and panel discussions

Regional Spring Summits

- 2022 Summits to be held in multiple locations
- Join local and regional advisors
- Round-table discussions on sales, servicing and practice management

Technology Workshops

- Learn from RPAG technology and support experts
- Gain knowledge on how to be streamlined and efficient
- Small group setting for focused learning

Live Phone & Email Support

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

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

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