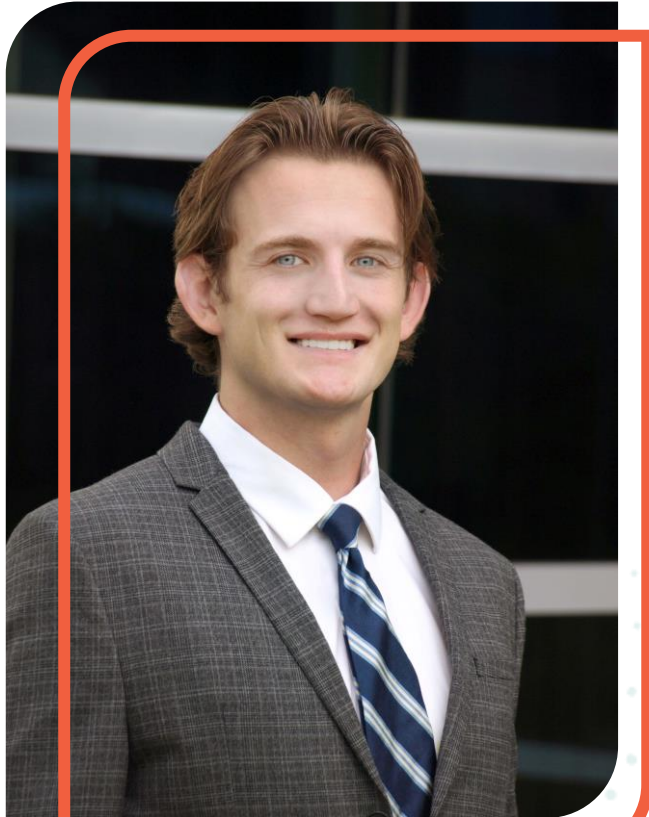


# What's New at RPAG?





# Luke Vandermillen Jr.

**Sr. New Business Development Associate**  
**RPAG**



**“There’s a way to do  
it better — find it.”**

**Thomas Edison**

# 629

Completed Enhancements to the RPAG  
Portal in 2022

# 2022 – Year in Review

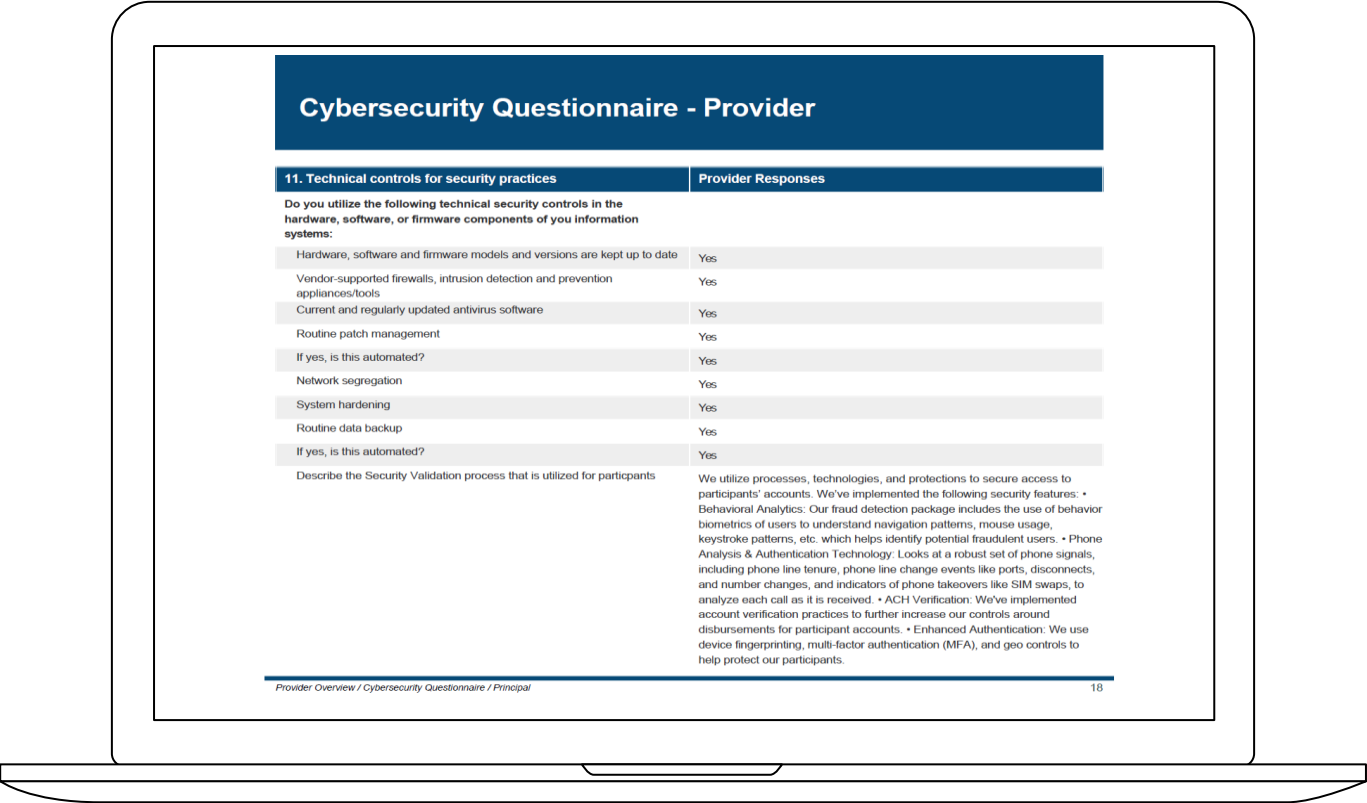
## More Tools in your Toolbox

Cutting-edge reporting and resources that help you fulfill your fiduciary responsibility and protect your clients

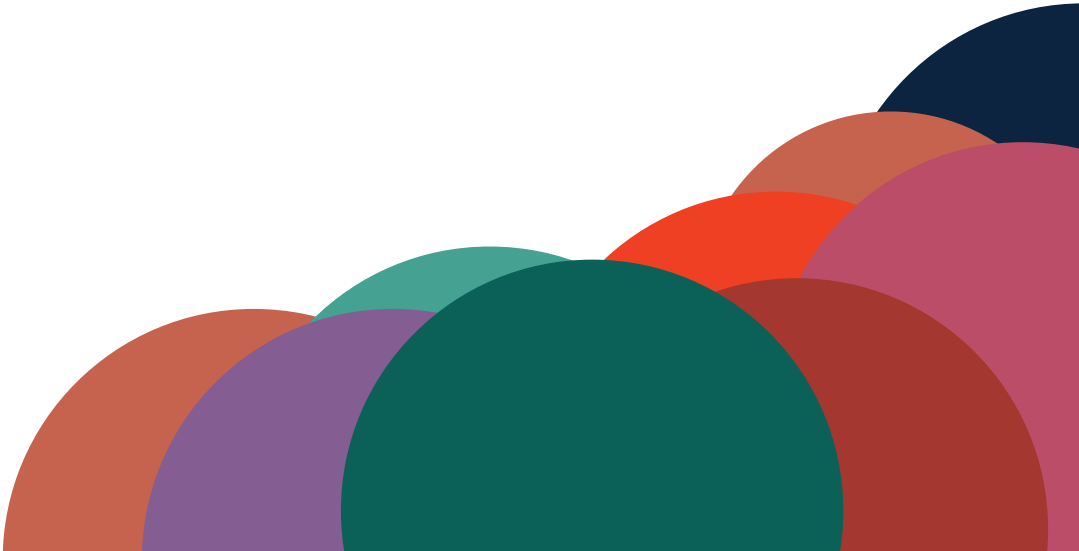
## Add Efficiency to Advisor Processes

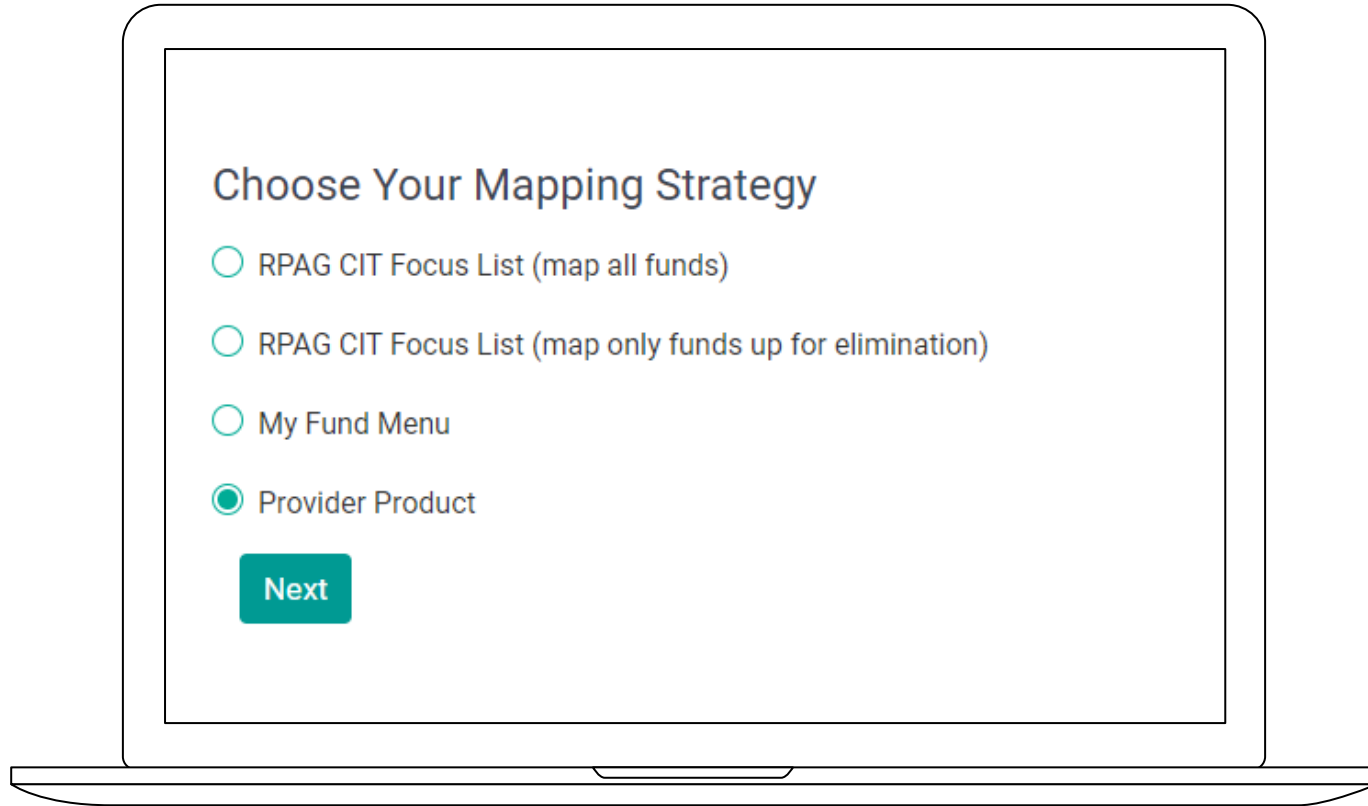
Less time running reports = More time winning new business and improving client relationships



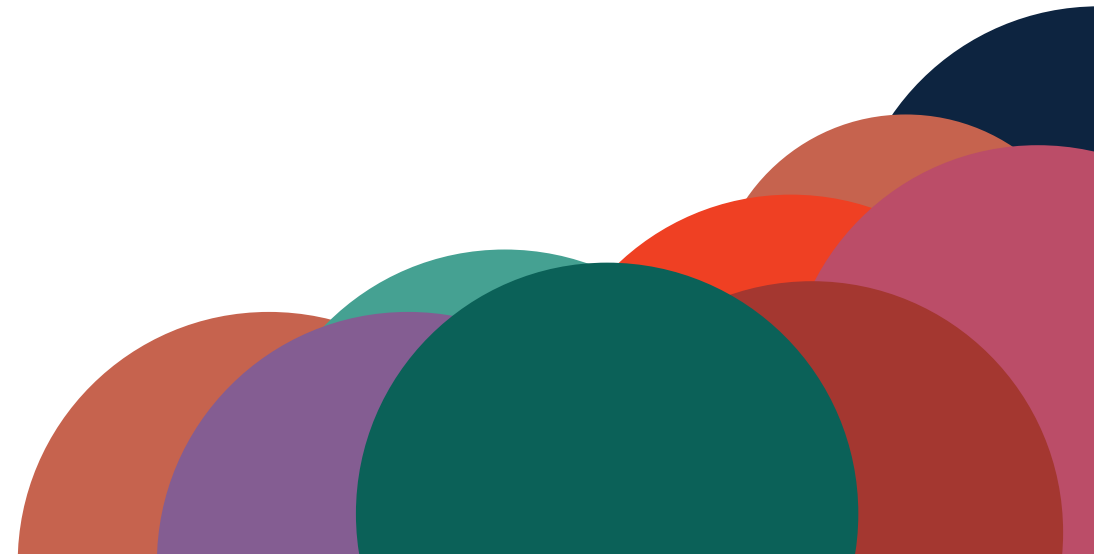


# Cybersecurity Reporting





# Mapping Strategy



## Plan Highlights

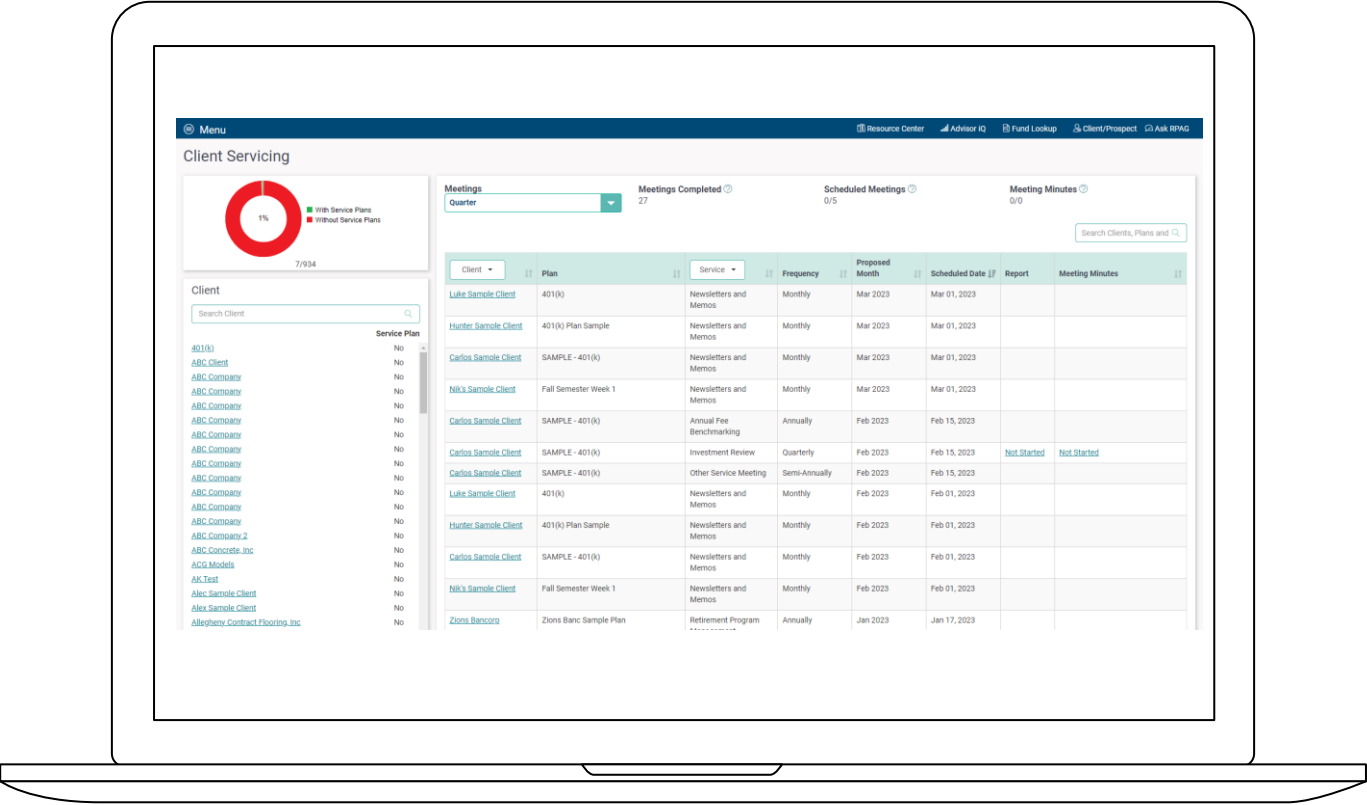
Sample Client - 401(k)

Type of Plan	401(k)
Eligibility	
Entry Dates	Deferral – Per Payroll
Employee Contributions	1 - 0 % of pay Per Payroll up to the maximum of \$19,500 in 2020 May change as of each payroll period Employee catch-up contributions allowed for participants 50 or older (extra \$6,500 for a total contribution of \$26,000 in 2023)
Employer Contributions	Discretionary Each Pay Period
Vesting	Employer match and profit sharing as follows: Year 0 0%
Automatic Features	Enrollment: Yes Escalation: Yes at percentage: 2%
Investment Options	10 investment options and 11 targeted retirement funds
Loans	No
Hardships/In Service	Hardships - No
Distributions	Following Retirement
Normal Retirement Age	65 years old
Account Access	<a href="http://www.accountaccess.com">www.accountaccess.com</a>
Account Statements	<a href="http://www.accountstatements.com">www.accountstatements.com</a>
Advisor	Advisor Support RPAG Advisor Training <a href="mailto:support@rpag.com">support@rpag.com</a> (949) 305-3859

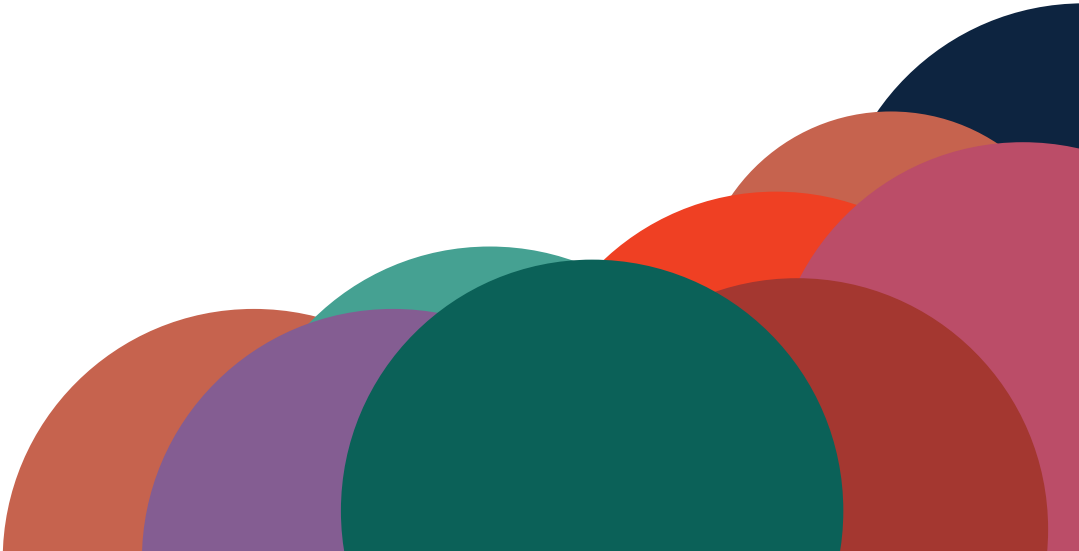
Sample Client / 401(k) / Sample Investment Review

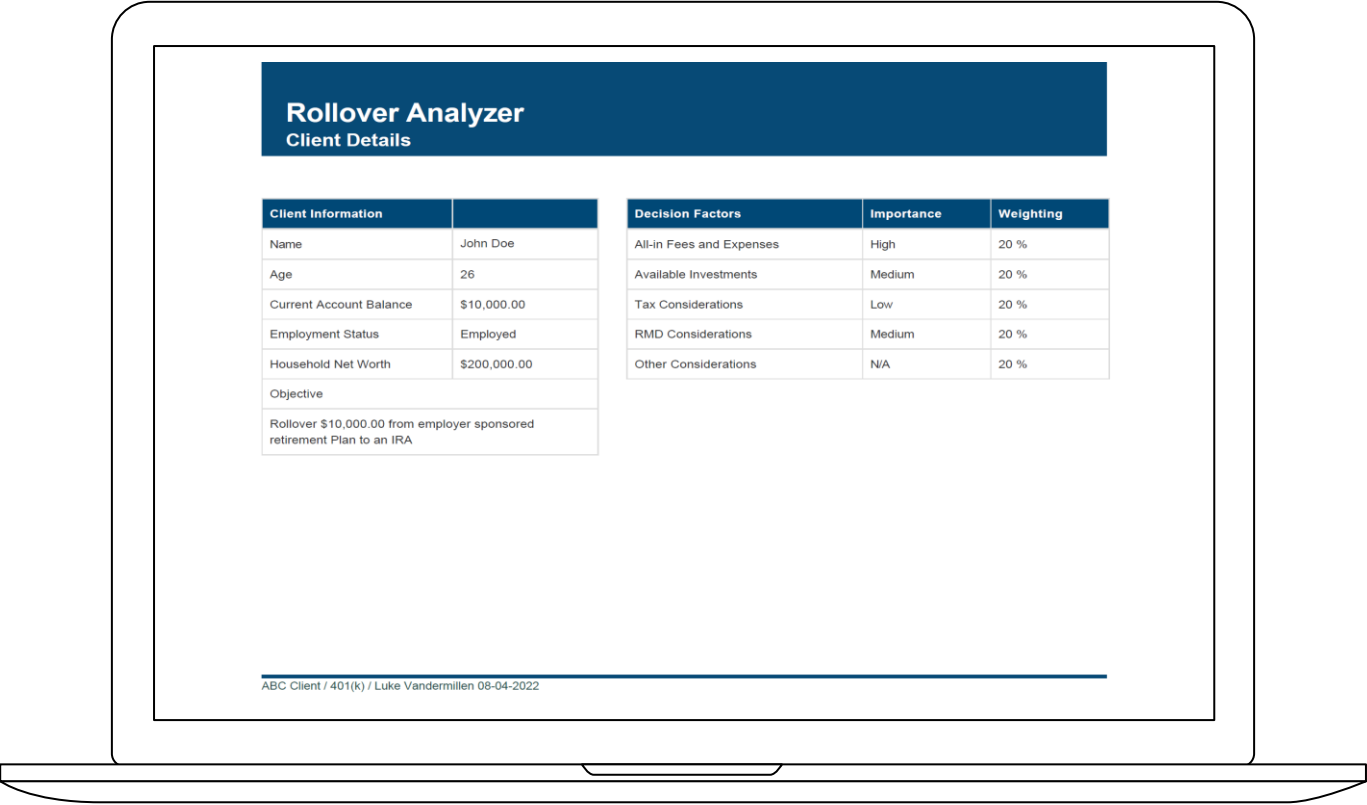
# Plan Highlights Module



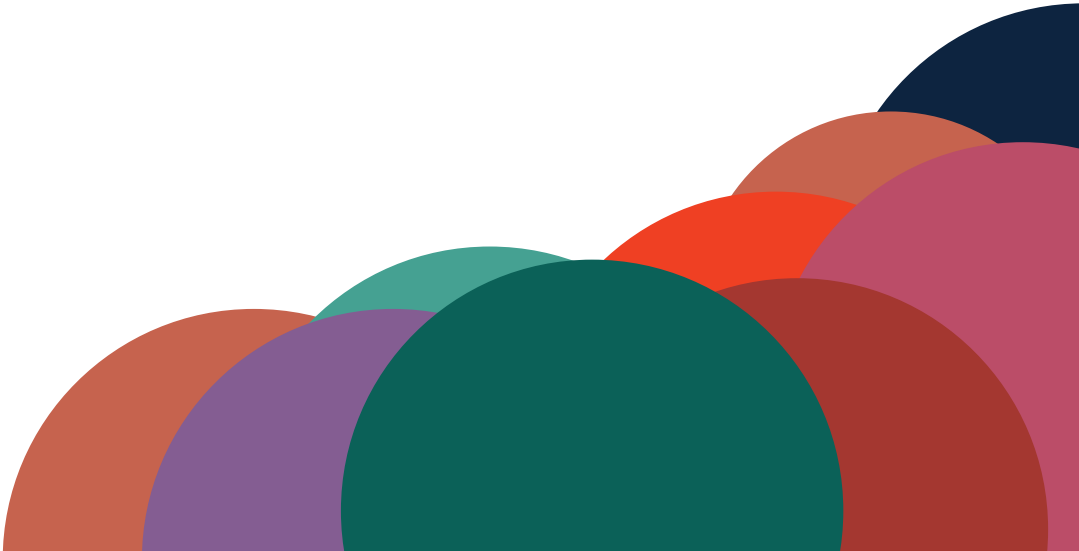


# Client Servicing Page





# Rollover Analyzer



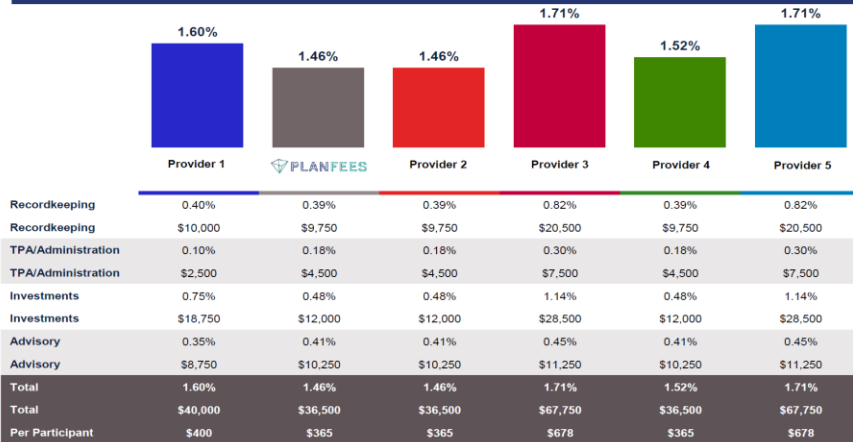
ESG Rating Methodology

Fund ESG Quality Rating	Fund ESG Rating	What it means	
8.6 - 10.0	AAA	Leader	The companies that the fund invests in show strong and/or improving management of financially relevant environmental, social and governance issues. These companies may be more resilient to disruptions arising from ESG events.
7.1 ~ 8.6	AA		
5.7 ~ 7.1	A	Average	The fund invests in companies that show average management of ESG issues, or in a mix of companies with both above-average and below-average ESG risk management.
4.3 ~ 5.7	BBB		
2.9 ~ 4.3	BB		
1.4 ~ 2.9	B	Laggard	The fund is exposed to companies that do not demonstrate adequate management of the ESG risks that they face or show worsening management of these issues. These companies may be more vulnerable to disruptions arising from ESG events.
0.0 ~ 1.4	CCC		

# ESG Reporting



## Total Fee Summary



Fees and services are subject to change. See provider's proposal for actual pricing. Final pricing, services, and contractual provisions are at the sole discretion of each plan provider. Competitive Average is the average of the bidding providers shown in this report. It does not include incumbent provider (current and/or re-bid) or industry average data.



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# RFP Express

# What's Next?



## Strategy Review

Automated Fund  
Commentary



## Custom Scoring

RPAG reporting with  
your custom score



## Venrollment

Exclusive discount for  
RPAG members!



## Enhanced WellCents Reporting

More options, more data



## WellCents Filter

Match the right advisor  
to the right employee



## UI Facelift

Intuitive and sleek design