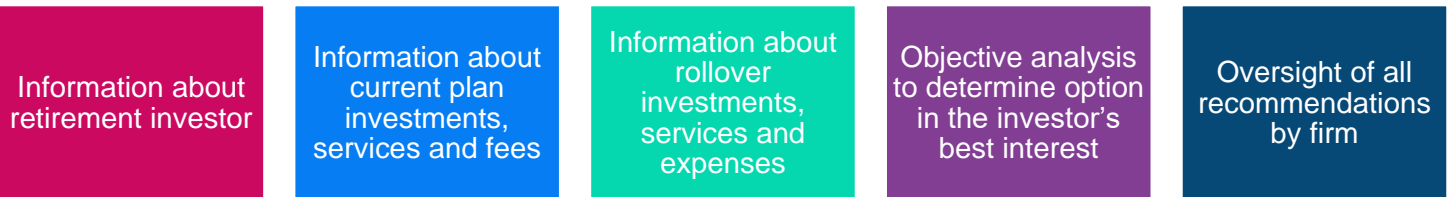




# Rollover Ready

Individuals are often faced with the challenging decision of whether to rollover their plan assets out of their company sponsored retirement plan or to keep it in the plan. The Department of Labor's Prohibited Transaction Exemption (PTE) 2020-02 requires financial professionals to document and have practice level oversight of their IRA rollovers.

Retirement Plan Professionals need an easy to use and scalable process that allows them to comply with PTE 2020-02 with minimal effort and maximum effectiveness. RPAG's Rollover Ready (formerly Rollover Analyzer) is an easy-to-use system that helps document the rollover process with a few easy steps. The Rollover Ready helps financial professionals with key objectives:



## RPAG Rollover Ready Highlights

- Easy-to-use system with seamless workflow and report generation
- The output documents the rollover recommendation that financial professionals make to participants
- Integrates with RPAG's Retirement Plan CRM, pulling plan investment and fee information
- Integrations with RPAG's PlanFees fee benchmarking data allows you to compare fees when plan documentation isn't provided or 5500 data is incomplete
- Easily pull plan data from the DOL website or through Larkspur Executive integration
- Oversight of all Rollover Analyzer recommendations captured through Advisor iQ for advisory firms, or Enterprise iQ for enterprise BD/RIA users

**For more information about the RPAG Rollover Ready, please contact [support@rpag.com](mailto:support@rpag.com) or call 949-305-3859.**