

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

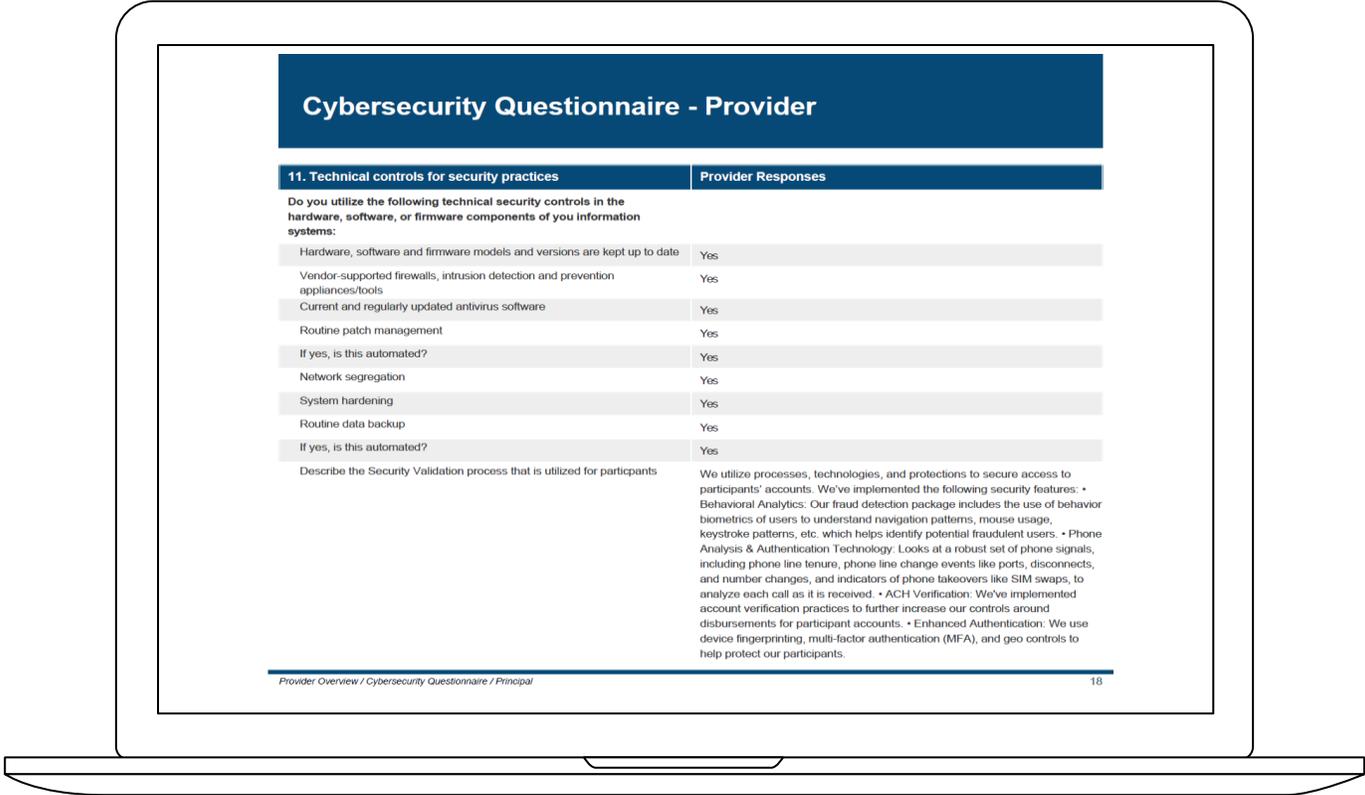
More Tools in your Toolbox

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



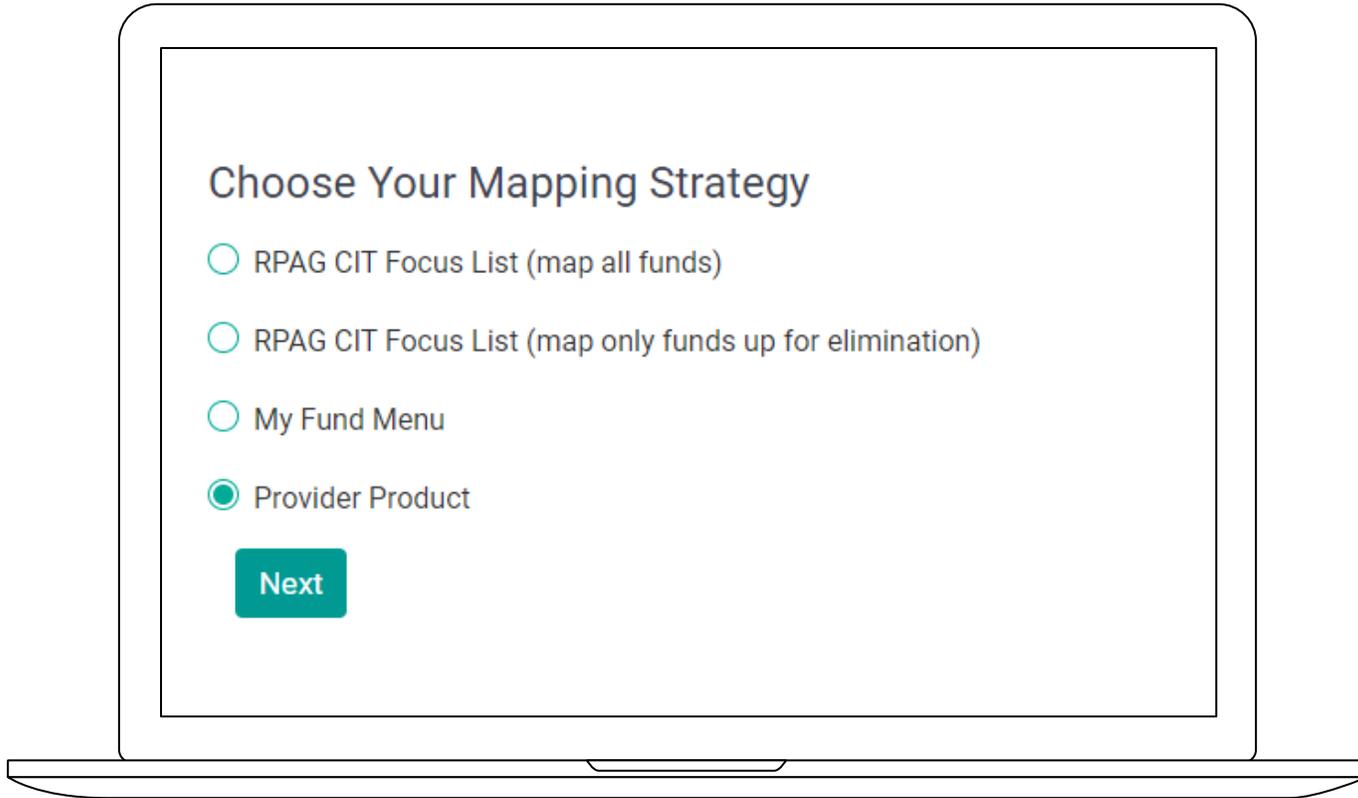


Cybersecurity Questionnaire - Provider

11. Technical controls for security practices	Provider Responses
Do you utilize the following technical security controls in the hardware, software, or firmware components of you information systems:	
Hardware, software and firmware models and versions are kept up to date	Yes
Vendor-supported firewalls, intrusion detection and prevention appliances/tools	Yes
Current and regularly updated antivirus software	Yes
Routine patch management	Yes
If yes, is this automated?	Yes
Network segregation	Yes
System hardening	Yes
Routine data backup	Yes
If yes, is this automated?	Yes
Describe the Security Validation process that is utilized for participants	We utilize processes, technologies, and protections to secure access to participants' accounts. We've implemented the following security features: <ul style="list-style-type: none"> • Behavioral Analytics: Our fraud detection package includes the use of behavior biometrics of users to understand navigation patterns, mouse usage, keystroke patterns, etc. which helps identify potential fraudulent users. • Phone Analysis & Authentication Technology: Looks at a robust set of phone signals, including phone line tenure, phone line change events like ports, disconnects, and number changes, and indicators of phone takeovers like SIM swaps, to analyze each call as it is received. • ACH Verification: We've implemented account verification practices to further increase our controls around disbursements for participant accounts. • Enhanced Authentication: We use device fingerprinting, multi-factor authentication (MFA), and geo controls to help protect our participants.

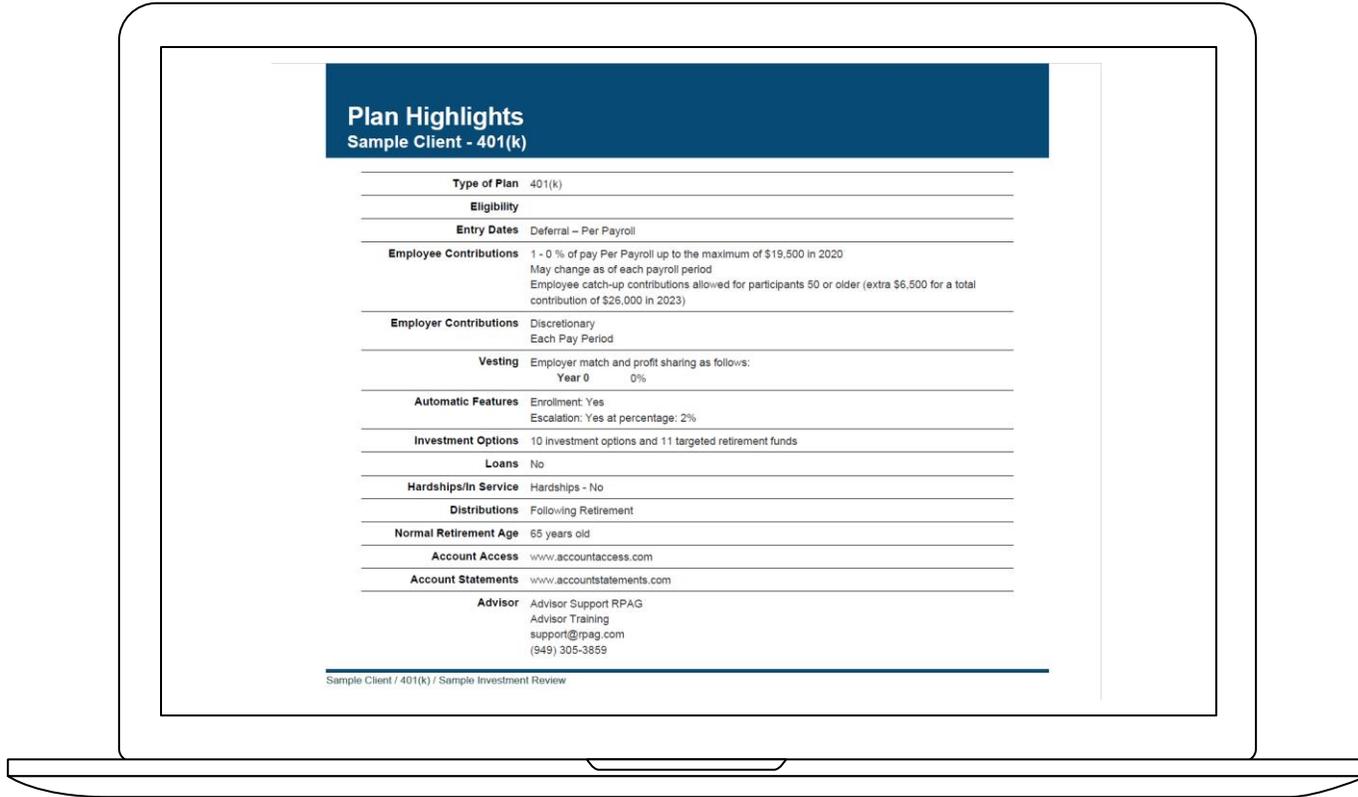
Cybersecurity Reporting





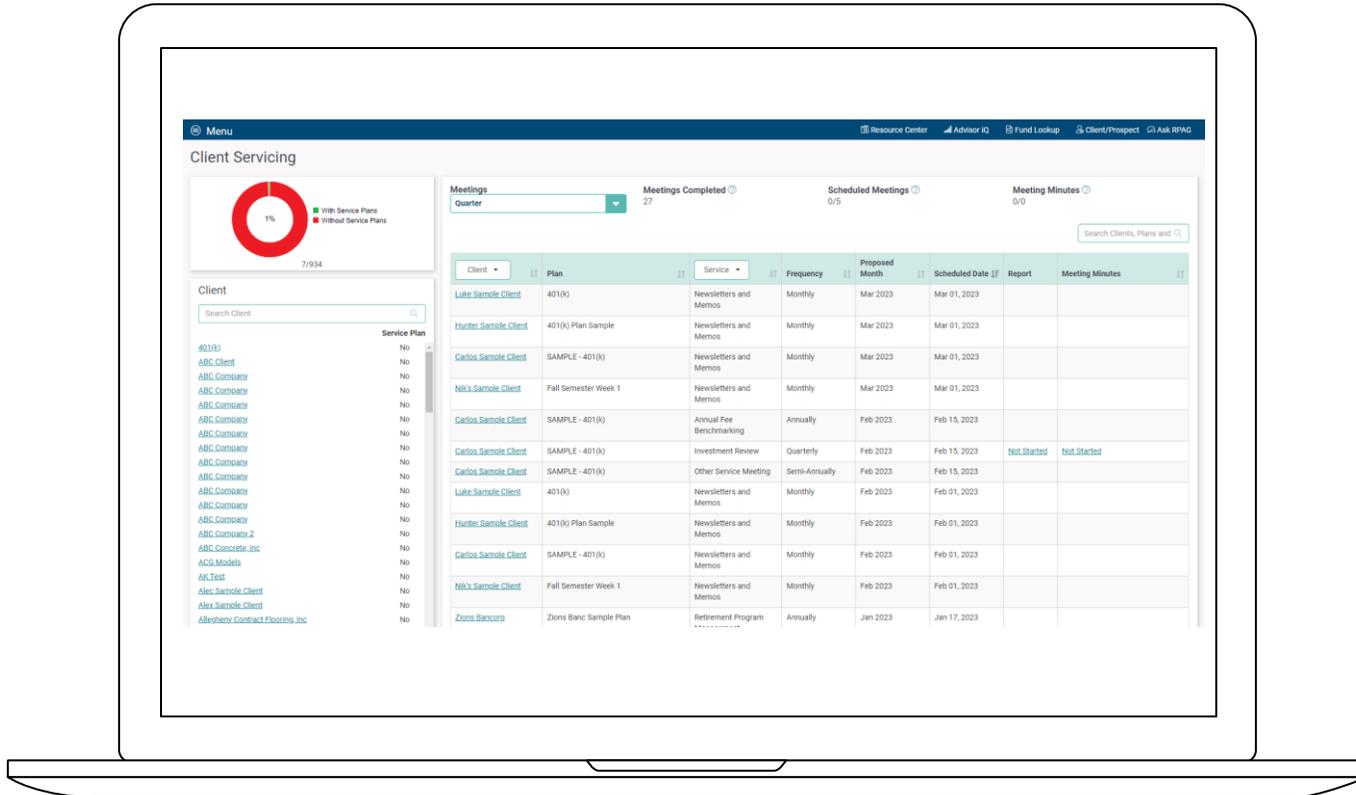
Mapping Strategy





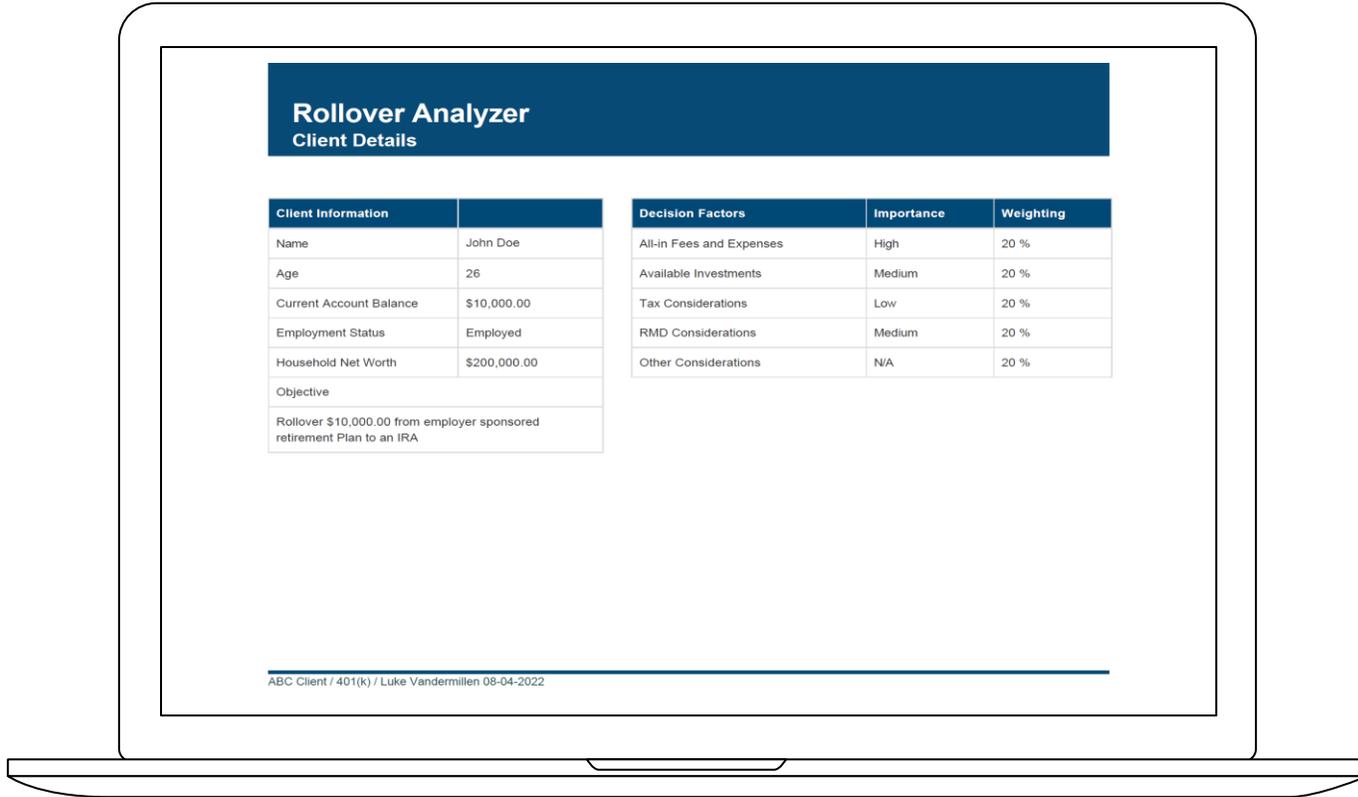
Plan Highlights Module





Client Servicing Page





Rollover Analyzer

Client Details

Client Information	
Name	John Doe
Age	26
Current Account Balance	\$10,000.00
Employment Status	Employed
Household Net Worth	\$200,000.00
Objective	
Rollover \$10,000.00 from employer sponsored retirement Plan to an IRA	

Decision Factors	Importance	Weighting
All-in Fees and Expenses	High	20 %
Available Investments	Medium	20 %
Tax Considerations	Low	20 %
RMD Considerations	Medium	20 %
Other Considerations	N/A	20 %

ABC Client / 401(k) / Luke Vandermillen 08-04-2022

Rollover Analyzer



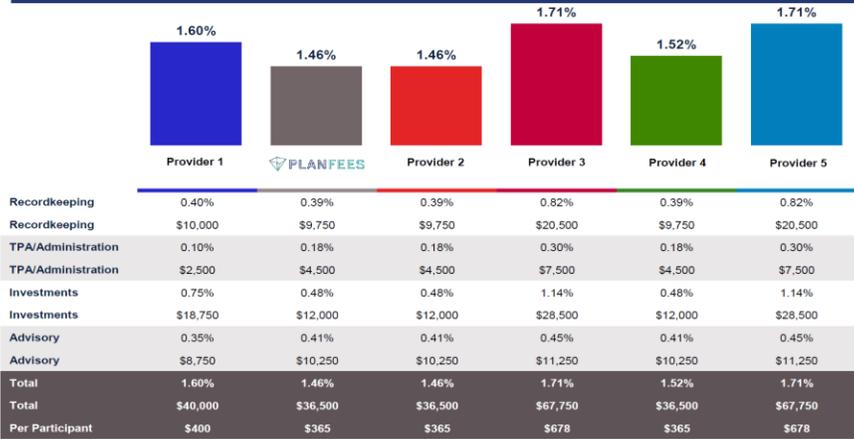
ESG Rating Methodology

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.



© 2022 PlanFees. All rights reserved. This report and the information contained herein may not be reproduced in whole or in part, or used in any manner, without advanced written permission from PlanFees.

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