

# State of the Platform

**Veronica Lee**

CHIEF RELATIONS OFFICER

RPAG



**\$1.25 Trillion**

Assets

**10 Million**

Plan Participants

**120,000**

Plans

# Team Members



**ERISA Resources**



**Investment Support**



**Money Manager Research**



**TDF Analysis**



**Sales and Marketing  
Support**



**Business Development  
Support**



**Corporate Sales Support**  
\$15B and growing!



**Training and Support**



**Live Tech Support**



**Practice Management**



**Exclusive Events**

# ***Technology Innovation***

**REGIONAL SUMMITS 2024**

## Service Provider Summary

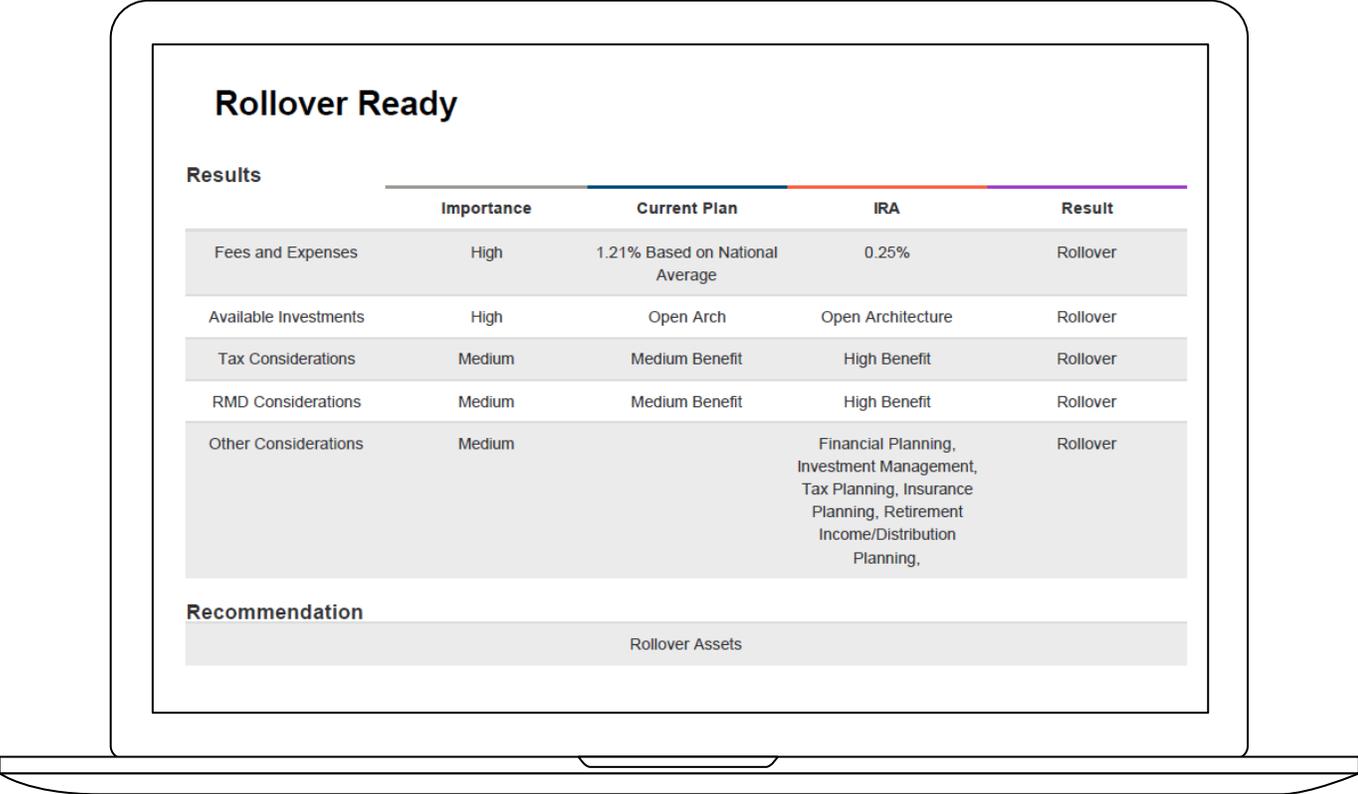


|                                       | Current Provider | Voya                    | Transamerica           | Empower              | Fidelity             | John Hancock         |
|---------------------------------------|------------------|-------------------------|------------------------|----------------------|----------------------|----------------------|
| <b>Product Name</b>                   | PRODUCT          | Signature               | FiduciaryPATH Exchange | NFPep                | Fidelity Advisor     | Signature            |
| <b>Type</b>                           | TRADITIONAL      | Traditional             | Exchange               | PEP                  | Exchange             | Traditional          |
| <b>TPA</b>                            | TPA NAME         | Pentegra                | FuturePlan             | Pentegra             | NA                   | FuturePlan           |
| <b>3(16) Administrative Fiduciary</b> | NA               | NA                      | FuturePlan             | Flexible             | Flexible             | Flexible             |
| <b>Investment Fiduciary</b>           | NA               | 3(21), ABC Advisory LLC | 3(38), fiduciaryPATH   | 3(38), fiduciaryPATH | 3(38), fiduciaryPATH | 3(38), fiduciaryPATH |
| <b>Pooled Plan Provider*****</b>      | NA               | NA                      | NA                     | Pentegra             | NA                   | NA                   |

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# RFP Express





## Rollover Ready

### Results

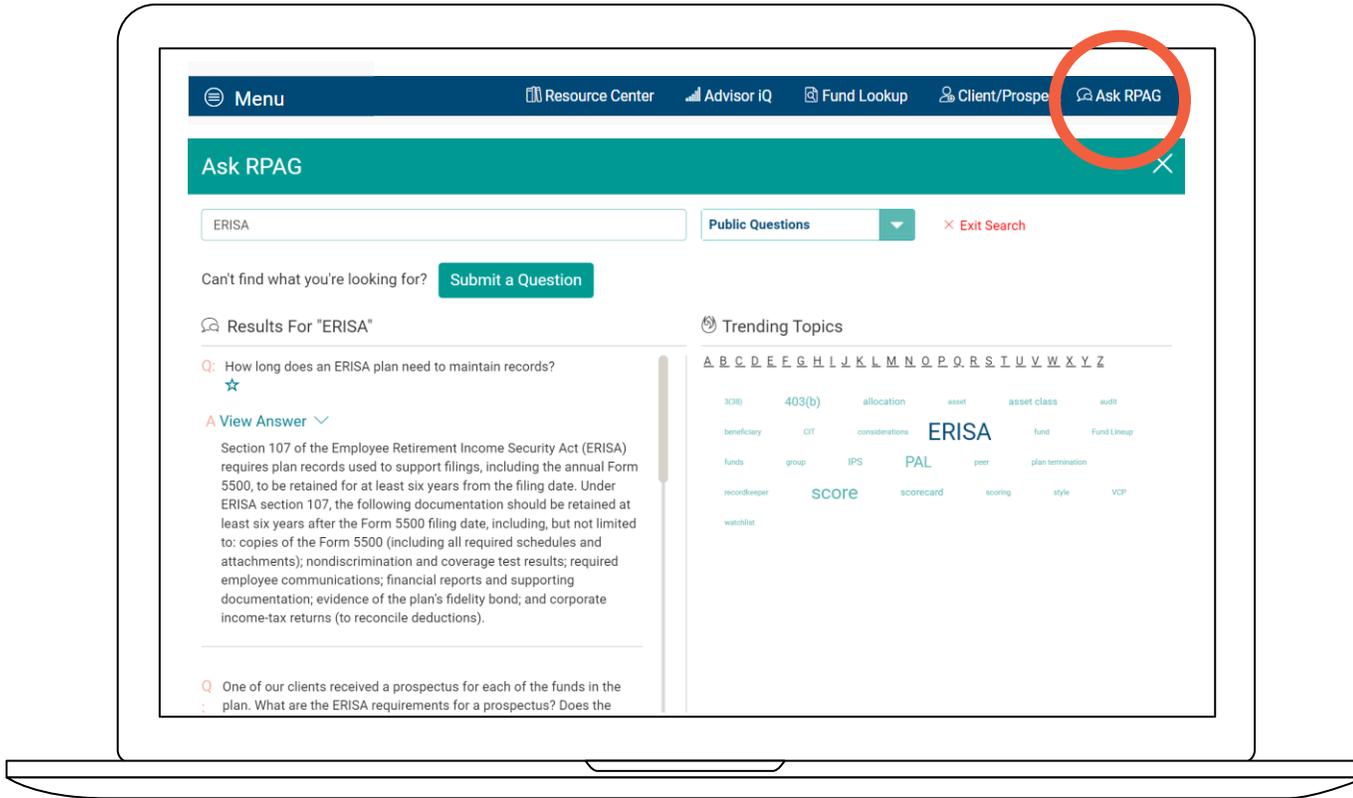
|                       | Importance | Current Plan  | IRA               | Result   |
|-----------------------|------------|---|-------------------|----------|
| Fees and Expenses     | High       | 1.21% Based on National Average   | 0.25%             | Rollover |
| Available Investments | High       | Open Arch   | Open Architecture | Rollover |
| Tax Considerations    | Medium     | Medium Benefit  | High Benefit      | Rollover |
| RMD Considerations    | Medium     | Medium Benefit  | High Benefit      | Rollover |
| Other Considerations  | Medium     | Financial Planning, Investment Management, Tax Planning, Insurance Planning, Retirement Income/Distribution Planning, |                   | Rollover |

### Recommendation

Rollover Assets

# Rollover Ready





# Ask RPAG





**Client advocacy  
report**



**Fund change  
notice templates**



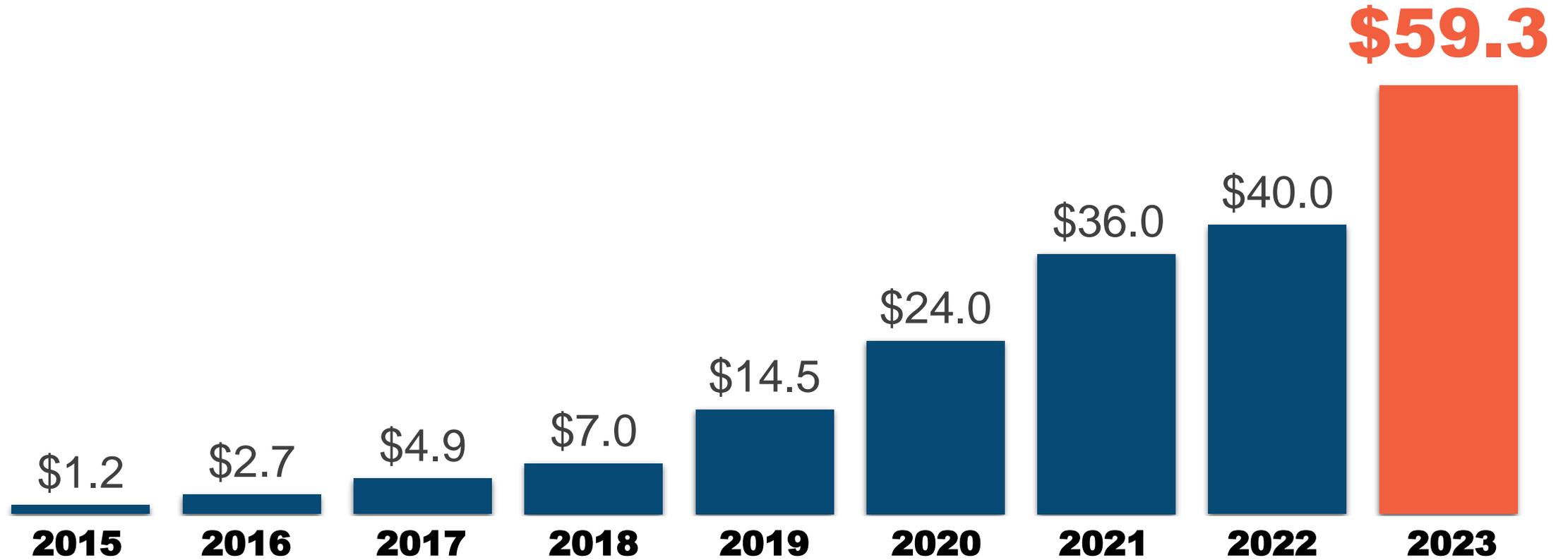
**Custom models  
performance  
calculation**

The background of the slide is a close-up photograph of lavender flowers. The flowers are in various stages of bloom, with some showing vibrant purple and others appearing more white or light purple. The background is softly blurred, creating a bokeh effect. A semi-transparent white rectangular box is overlaid on the image, containing the main text.

# ***Investment Innovation***

**REGIONAL SUMMITS 2024**

# Total Custom Solutions CIT Growth (in billions)



# 2024



|       | Value   | Blend     | Growth   |       |
|-------|---|-----------|--|-------|
| Large | Putnam INVESTMENTS<br>J.P.Morgan ASSET MANAGEMENT<br>MFS                    | BlackRock | ClearBridge Investments<br>American Century Investments®<br>J.P.Morgan ASSET MANAGEMENT<br>[A/B] | Large |
| Mid   | American Century Investments®<br>Allspring                                  |           | BlackRock<br>Janus Henderson INVESTORS   | Mid   |
| Small | American Century Investments®<br>PIMCO<br>COLUMBIA THREADNEEDLE INVESTMENTS |           | VOYA<br>NEUBERGER BERMAN<br>[A/B]  | Small |

### International Value

### International Blend

### International Growth

 CAPITAL GROUP® | AMERICAN FUNDS® | MFS

### Emerging Markets

 Invesco | BlackRock

### Core Fixed Income

 PGIM | WESTERN ASSET | LORD ABBETT®

### Balanced/ ESG

 Amundi Pioneer ASSET MANAGEMENT

### Cash Balance + TDFs

 flexPATH STRATEGIES | T.RowePrice

### Stable Value

 Putnam INVESTMENTS

# THANKS TO OUR PARTNERS!

- ✓ Trends
- ✓ Value-add resources
- ✓ Technical knowledge
- ✓ Referral sources, people looking to change firms
- ✓ Partners are friends!

# EMERALD

**BlackRock**<sup>®</sup>



CAPITAL GROUP<sup>®</sup> | AMERICAN FUNDS



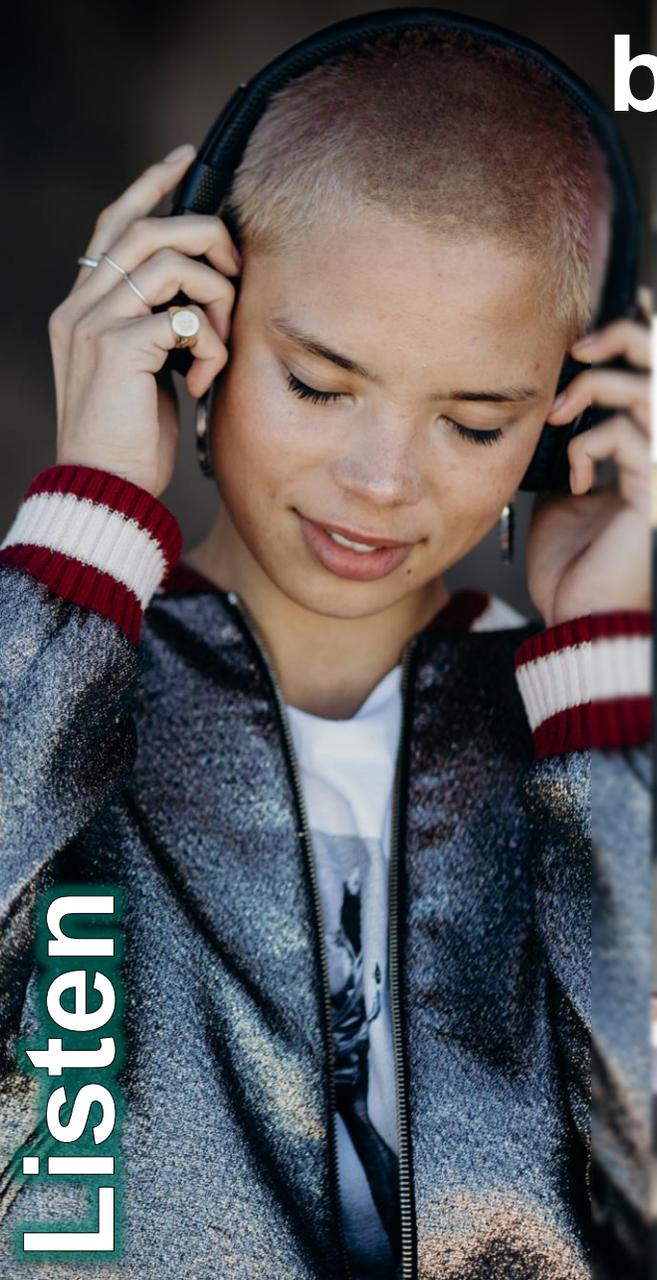
GREAT GRAY  
TRUST COMPANY

**nuveen**  
A TIAA Company

P I M C O

 Principal<sup>®</sup>

# Idea exchange to enhance your knowledge, business and engagement



**Listen**



**Learn**



**Share**



**Fun**

# 2024 REGIONAL SUMMIT

