

POWERING GROWTH



Why Join RPAG? A Member's Perspective

As an RPAG member, you are not just gaining access to a platform, you're stepping into a community designed to power your growth, streamline your operations, and elevate your client outcomes.

RPAG is a platform built for modern advisors that connects you to cutting-edge solutions, a thriving advisor community, and the scalable infrastructure you need to thrive in today's competitive market.

Here's why current members of RPAG recommend it, and why you should consider joining:

1 UNLOCKING SCALABLE GROWTH

RPAG empowers you with the solutions and resources to grow your business efficiently, helping you with everything from fiduciary oversight to client reporting. The platform centralizes all the data, solutions, and insights needed to manage and scale retirement plans, enabling you to deliver high-quality service to clients without sacrificing growth potential.

RPAG's tools make us look bigger than we are. It's the perfect fit for firms looking to grow without needing a massive team.



A FLORIDA BASED ADVISOR

2 BEST-IN-CLASS INNOVATION AND TECHNOLOGY

RPAG's technology is built for the modern advisor, giving you a competitive edge in an ever-evolving industry. From automating compliance reports to offering live-bid RFPs and participant engagement solutions, RPAG's suite of solutions takes the complexity out of retirement plan management. RPAG continuously innovates to ensure that you stay ahead of the curve, driving efficiency and enhancing client outcomes.

RPAG is more than just a tech provider; they are leading the way in transforming the industry. From AI-powered solutions to live reporting, they've revolutionized the way we work.



AN IRVINE BASED ADVISOR

3 DATA-DRIVEN DECISION MAKING

The core strength of RPAG lies in its robust data aggregation capabilities. By providing seamless data aggregation and advanced analytics, RPAG helps you make more informed decisions, empowering you to better serve clients and improve participant outcomes. Whether you're benchmarking fees, tracking investments, or ensuring fiduciary compliance, RPAG's data-driven tools make it all possible.

RPAG has allowed us to focus on what matters—delivering results for clients—by centralizing all the data we need in one place. It's like having a Bloomberg terminal for the retirement space.



FROM A FIRM WITH \$653 BN IN AUM

4 EMPOWERING COMMUNITY AND THOUGHT LEADERSHIP

RPAG isn't just a software platform, it's a community of like-minded, top-tier advisors. The exchange of ideas and insights within the RPAG network helps you stay on top of industry trends, share best practices, and build long-term business relationships. Being part of the RPAG community means you have access to a wealth of knowledge that can propel your business forward.

The RPAG community has been a huge asset to my firm. The constant exchange of ideas and access to top-tier specialists has allowed us to stay ahead of the curve. It's truly a partnership in every sense.



A GEORGIA BASED ADVISOR

5 COMPREHENSIVE TOOLS AND RESOURCES FOR GROWTH

RPAG provides a comprehensive suite of solutions designed to scale your practice. From fiduciary governance tools to automated meeting agendas, RPAG helps you manage large volumes of retirement plans with ease. The platform allows you to offer differentiated services, like access to exclusive CITs, precise benchmarking, and premium marketing resources, ensuring your practice stands out.

RPAG's platform is the one-stop-shop I've been searching for. The range of tools—everything from reporting to marketing—makes us more efficient and impactful.



AN IRVINE BASED ADVISOR

6 REAL RESULTS FOR REAL PEOPLE

RPAG's impact goes beyond efficiency. It drives meaningful change in the lives of your clients. With access to automation, benchmarking, and marketing resources, RPAG helps you achieve better client outcomes while growing your business.

The tools RPAG provides have allowed us to have a direct impact on participant behavior, helping them save more, plan better, and ultimately retire successfully. That's why I'm all-in with RPAG.



A MICHIGAN BASED ADVISOR

JOIN THE RPAG COMMUNITY TODAY

Becoming an RPAG member means more than just using a platform—it's about joining a community that is committed to transforming the retirement planning industry. Whether you're a small independent advisor or a large national firm, RPAG equips you with the solutions, insights, and support you need to succeed.

Ready to elevate your retirement planning practice?
Let's connect and see how RPAG can help you grow, scale, and thrive.



WHY RPAG?

Retirement Plan Advisory Group (RPAG) is a consulting firm that inspires advisors to reach their highest potential. Integrity, transparency, and the highest ethical standards drive our actions and behavior. Our commitment to excellence and innovation allows us to anticipate the changing retirement plan landscape and regulatory environment. As a result, our platform allows advisors to create successful retirement plan outcomes by protecting plan fiduciaries and engaging plan participants to reach their retirement income potential.

Retirement Plan Advisory Group, LLC ("RPAG") provides technology, solutions and services for a fee to its customers, who are primarily retirement plan advisors and associated institutions. The services include ratings of various third-party investment vehicles based on RPAG's proprietary quantitative and qualitative scoring methodology. The investment vehicles do not pay to be evaluated and scored; nor do the companies that provide services to the investment vehicles pay for them to be evaluated and scored, but those companies may have commercial relationships and affiliations with RPAG.

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