

Fulfilling Promises

2020 Client Satisfaction Survey Results

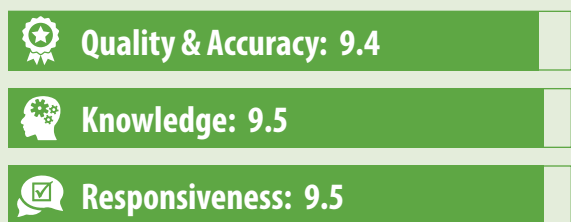
We asked 2,500 plan sponsors to rate their experience with BPAS on a scale of 1 to 10. We also asked for suggestions on what we could do better. Thanks to all of you who participated. Here are the results.

94% of clients are **very satisfied** with BPAS

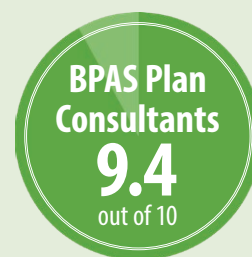
- ★ "Reasonable fees, employees have been great to work with, overall, a solid experience."
- ★ "Rapid and efficient service"
- ★ "It's great knowing if we have a question, a person who knows our plan is available by phone, email or fax."

BPAS Plan Consultants

Average rating on a scale of 1 to 10

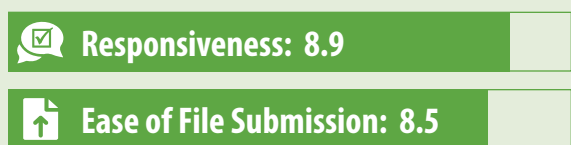


- ★ "Educated, reliable, helpful, friendly, responsive to any questions related to the plan, works well with us during our annual pension audit, and always offers to lend a hand if we need help."
- ★ "I wish there was a higher number than 10. I don't know what I would do without her."
- ★ "Our PC has been with us since 2004 and has always been very good to work with. We appreciate having continuity on the account."
- ★ "Always willing to go the extra mile to help us or guide us in all aspects."

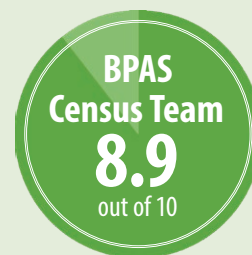


BPAS Census Team

Average rating on a scale of 1 to 10



- ★ "I think the Census Team is the best customer service driven group I have ever worked with. They are very knowledgeable."
- ★ "I really appreciate how intuitive CensusPRO is to use. It makes the process of uploading/updating our files very easy."
- ★ "Working with the Census team has been a pleasure. They are always willing to help get me through when I have a problem. A really great team of people."



Client Favorites

- ✓ I like the amount of education/resources and access that BPAS has made available to all of our employees/participants.
- ✓ BPAS employees are great and easy to work with! They also notify us of any account changes, which is important from a security standpoint.
- ✓ BPAS is good at communicating with plan sponsors and participants.
- ✓ BPAS is willing to work with us on all aspects. Solutions are discussed, agreed upon, and worked towards. Some providers refuse to get into much ERISA when things get complex or complicated. BPAS has helped put teams together to assist.
- ✓ Annual filings and preparation for those submissions are easy.

Client Wish List

- + We'd like better, more customizable reports on employee data.
- + I really want employee 401k plans to be automated with payroll, truly self-service for participants and plan sponsors so there are zero errors occurring with manual sign-ups, changes in withholdings, etc.
- + More BPAS analysis of our participant data/behaviors and providing guidance on participant education and improvement of retirement readiness/financial well-being outcomes.
- + I would like the ability to separate my hourly from my biweekly employees. We have our employees separated by department but in some departments we have both hourly and biweekly employees.
- + Looking forward to enhanced websites for account management.

Your Opinion Matters

At BPAS, we always respond to your needs. Please keep the ideas and feedback coming. We're listening. Watch for more product and service enhancements in the coming months.

One Company. One Call. ☎ **1.866.401.5272** | ✉ **trustsales@bpas.com** | 💻 **bpas.com**