



*Work with experts focused on saving you time and reducing headaches.*

## Simplified Solutions

At BPAS, we provide you with flexibility and expertise that you can count on to ensure your retirement plan is well received by employees, while being stress-free to administer.

We focus on delivering custom solutions using premier administration and recordkeeping technology, so you can save time, reduce plan headaches, and build a program that truly helps employees save for the future. We provide you with a team of experts dedicated to navigating the complexities of retirement plans and collaborating with you on the best fit for your organization.

## Unique Approach

Retirement plans can be complicated. At BPAS, we are focused on simplifying the complicated by providing a full range of services to solve your plan challenges- without the need to engage multiple providers. These services, combined with our conflict-free open architecture platform, provide the support, versatility and experience you can depend on.



### Integrated

BPAS is more than just a recordkeeper. We are fully-bundled and act as your recordkeeper, administrator, custodian and clearing firm—all under one roof.

We focus on all types of retirement plans and we have the expertise to service them well.

- All Defined Contribution & Defined Benefit Plans
- Multiple Employer Plans/Trusts (MEPs/METs/PEPs)
- Plans with Employer Securities
- Puerto Rico 1081.01
- VEBA/HRA, HSA Services

**One Company. One Call.**



### Streamlined

A core focus of our program is to take ownership over administrative matters, automate routine tasks, and make life easier for you. Through a team of experienced professionals and innovative technology we provide every plan with:

- Dedicated Retirement Plan Consultant
- Simplified Year-End Process
- Eligibility and Enrollment Tracking
- Loan and Distribution Services
- Vesting Updates in Real-Time
- Automatic Enrollment and Escalation Tracking

**We take care of the plan details so you don't have to.**



### Committed

Our knowledgeable staff are distinguished by their quality, depth of ERISA experience and dedication to excellence. We deliver expertise and partnership you can count on.

*"The best consultant I have ever worked with over the many years I have done this."*

*"She is always available for questions and happily walks through any information that needs to be covered with detail. We are so grateful to have her as our plan consultant. She is truly outstanding!"*

**At BPAS, relationships matter.**

# Simplified Solutions

## Hassle-Free

Retirement plans don't need to be messy. If you've been frustrated and disappointed with your retirement plan providers, call us. We will work to create a custom solution that meets your needs.



### 2025 Client Survey Results

**96%** of clients are **satisfied** with BPAS



### BPAS Plan Consultants

Satisfaction score out of 100%

**Quality & Accuracy: 99%**

**Knowledge & Expertise: 96%**

**Communication: 91%**

**95%**  
overall satisfaction  
with  
BPAS Plan  
Consultants

**85%**  
of clients report  
BPAS simplified  
HR's workload

**92%**  
satisfaction  
with  
BPAS Participant  
Services

**97%**  
of clients would  
recommend  
BPAS

NAPA Advisors placed BPAS in the Top 5 Recordkeepers for **four years running** in multiple categories & markets.



### BPAS Services

<b>Plan Administration &amp; Recordkeeping</b>	Bundled administration, recordkeeping, and custody for Defined Contribution Plans
<b>Actuarial &amp; Pension</b>	Actuarial and consulting services for Defined Benefit, Cash Balance plans
<b>TPA</b>	Unbundled retirement plan administration services
<b>VEBA/HRA &amp; HSA</b>	Full administration of VEBA/HRA, HSA, FSA, Transit and Parking plans
<b>Fiduciary Support</b>	3(16) Administrative Services Optional 3(21) and 3(38) Advisory Services
<b>IRA Administration</b>	Retail IRA services and statutory IRA rollovers
<b>MyPlanLoan</b>	Direct loan payment services for active and terminated participants

**Ready to learn more? Let's talk.**



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**SERVICES:** Workplace Retirement Plans | Actuarial & Pension | Health Benefit Consulting | IRA | VEBA/115 Trusts | Health & Welfare Plans  
Fiduciary | Collective Investment Funds | Fund Administration | Institutional Trust | Advisor Coaching

**SUBSIDIARIES:** BPAS Trust Company of Puerto Rico | Global Trust Company | Hand Benefits & Trust | NRS Trust Product Administration