



Unique Approach to Retirement Plans

BPAS simplifies the complicated nature of retirement plans. We offer a full range of services to meet the challenges and complexities of your clients' retirement needs. Our one-stop-shop approach reduces time and eliminates the frustration of dealing with multiple providers. These services, combined with our conflict-free, open-architecture platform, provide the support, versatility, and experience you can depend on.

One Company. One Call.



Efficiency

Our partners report a large reduction of time spent on plans with BPAS!

BPAS delivers a fully-bundled and efficient service model that includes:

- Superior recordkeeping services
- Expert consulting, administration, and compliance services
- Custody and clearing services

Our time-saving processes include:

- Loan adjudication and distributions
- Automatic enrollment and escalation tracking
- 3(16) Administrative Services
- Eligibility tracking
- Unique MyPlanLoan feature
- Automatic cash-out of small balances to BPAS IRAs

“BPAS has reduced the time our HR team spends on our plan by more than 40% compared to our previous recordkeeper. We won’t ever go back to the old way.”

R. Desmond - Client HR Director



The BPAS Experience

94% of BPAS clients confirm they are very satisfied with BPAS!

We are fully committed to providing longterm, industry-leading service to our partners and participants. You'll see the difference right from the start:

- During the implementation/ conversion process, you'll work with an expert Implementation Specialist.
- Each BPAS financial partner is assigned a dedicated Relationship Manager (RM) who is your go-to for all ongoing questions.
- Each Plan Sponsor has unfiltered access to a dedicated Plan Consultant who is trained to deal with routine, as well as complex, plan issues.

“They are exceptional professionals, they know their stuff, are very responsive, and provide A+ service.”

C. Matthews - Advisor



Stability

Clients and partners have depended on our superior recordkeeping and administrative services for nearly 50 years.

- BPAS has been an integral and valued subsidiary of Community Financial Systems, Inc. (CFSI) since 1996.
- The long-standing tenure of our specialists ensures consistent, knowledgeable service.
- We pride ourselves on developing and maintaining stable, longterm relationships with our partners.

BPAS is here for the long haul. Let's grow together!

NAPA Advisors placed BPAS in the Top 5 Recordkeepers across multiple markets and categories for 4 consecutive years!



BPAS is big enough to serve you, but small enough to know you!

Ready to learn more? Let's talk.



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