



BPAS



Education Support Services

While all BPAS plans include our proprietary BPAS University, Financial Wellness Center, and Online Enrollment Kit, we've found that partners and employers are looking for even more ways to educate and communicate across a diverse and often remote workforce. To answer the call, we've created a series of customizable Education Packages designed to help you increase awareness and participant engagement.

Basic Package

Financial Freeway, our virtual video platform, is great for new hires and employees on-the-go. We include a custom plan provision video and up to nine other general topic videos, branded at the Plan or Advisor level for an additional personalized touch. And great news - it's automatically available in English and Spanish!

Annual fee: \$500

Enhanced Package

Our Enhanced education package includes our virtual video platform as well as two live virtual sessions conducted by a BPAS Participant Education Specialist. We'll record the live sessions for easy reviewing. Provide employees an opportunity to engage and ask questions. English or Spanish.

Annual fee: \$1,500

Premier Package

Keep employees engaged throughout the year. Our Premier education package includes our virtual video platform, two live virtual sessions, and a quarterly email campaign. Whether new hires or nearing retirement, our approach and topics reach a broad audience. English or Spanish.

Annual fee: \$3,000

Want a truly customized educational experience? At BPAS, we're here to help. Our dedicated team of Education Specialists will design a strategy tailored to your unique needs.



Virtual Sessions: Whether a new plan or an annual refresher, our education specialist will create and present a customized and engaging virtual meeting for your employees. We can cover enrollment, investing, preparing for retirement, or your choice of topic. Choose from live or pre-recorded virtual sessions. English or Spanish. \$500 each



Customized Video: Geared toward new hires and non-participants, we'll create a brief, engaging video to encourage employees to start saving for retirement. We'll keep it fresh and updated annually, utilizing your branding and images from your industry. English or Spanish. Annual fee: \$1,000



On-Site Meetings: Whether a new plan or an annual refresher, our education specialist will create and present a detailed meeting for your employees. Topics range from enrollment, to investing, to preparing for retirement. We'll include time for a live and interactive Q&A session at the end. English or Spanish. \$1,500 per day + travel



Spanish Translation Services: Reach your Spanish speaking audience with translation services. While we offer a variety of educational resources in Spanish already, perhaps you'd like a customized piece. Whether it's a custom welcome letter or a comprehensive presentation you created, our bilingual employees will provide you with a translated communication ready for distribution. \$75 per hour (1 hour minimum)

Let's get participants on the road to financial security.



Contact Information

Name:

Advisory Firm:

Email:

Phone Number:

Education Services for:

Indicate Plan Name: _____

Book of Business - Are you interested in implementing education services for your entire Book of Business? Please reach out to your BPAS Representative for a customized quote.

Annual Education Packages

Basic Education:

Annual fee: \$500

Enhanced Education:

Annual fee: \$1,500

Premier Education:

Annual fee: \$3,000

Optional Services

Custom Pre-Recorded Videos:

Annual fee: \$1,000 each

Virtual Sessions:

\$500 per virtual session.
Indicate desired # of sessions: _____

On-Site Meetings:

\$1,500 per day + travel.
Indicate desired # of days: _____

Language Services

Select language preference for any of the above services:

English Spanish

Indicate if Spanish translation services are requested for your custom communications:

\$75 per hour (1 hour minimum)

Invoicing

Indicate who should be invoiced:

Financial Intermediary Plan Sponsor

Important: This worksheet represents interest and estimated costs for custom education services only. Your BPAS fee schedule will be revised to include selected services and reflect actual costs. If preferred, BPAS can include these costs as basis points instead.

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Questions? We're here to help.



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