



Understanding the Full Depth of our DC Business

BPAS is a national provider of retirement plans, benefit plans, fund administration, and institutional trust services. We make it our mission to simplify the complicated by delivering benefit-plan services that solve client challenges without the need to engage multiple providers. One company. One call.

We support 4,500 retirement plans, \$110 billion in trust assets, \$1.3 trillion in fund administration, and more than 620,000 participants. Of our participant count, 318,000 are Defined Contribution (DC) engagements. Our book of business includes nearly 50 DC plans with 1,000 or more participants. Our individual plans range from 1 to 13,000 participants. We also administer plans for more than 50 household-name clients. Here's a deeper dive into our DC business.

Breakdown of Asset and Participant Count Across BPAS Defined Contribution (DC) Plans

ASSETS	% of Participants	% of DC Assets
< \$ 3M	20%	13%
\$3M - \$9.9 M	22%	24%
\$10M - \$24.9M	20%	21%
\$25M - \$49.9 M	15%	15%
\$50M - \$500 M	23%	27%

PARTICIPANTS	% of Participants	% of DC Assets
< 50	14%	22%
50 - 99	11%	15%
100-249	16%	18%
250 - 499	16%	13%
500-999	14%	9%
1,000+	29%	23%



While large plan clients often request additional services, **we deliver the same robust solution with first-rate service, expertise, and accountability to plans of all sizes.** And, our vertically integrated structure and service model are saving time and work HR professionals. Our client surveys show that **85% of BPAS clients report a significant reduction in plan-related workload.** That's why we earned top spots among the National Association of Plan Advisors (NAPA) 2022 and 2023 Advisors' Choice awards in nearly all categories and across all plan sizes, micro to mega.



Whatever the plan size, count on BPAS.

Ready to Learn more? Let's talk.



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SERVICES: Workplace Retirement Plans | Actuarial & Pension | Healthcare Consulting | IRA | VEBA HRA | Health & Welfare Plans
Fiduciary | Collective Investment Funds | Fund Administration | Institutional Trust

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

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