



Your One Source for Participant Education

As you know, a successful retirement plan consists of strong plan design, investment oversight, and high participation levels. A committed strategy between you, BPAS and the Plan Sponsor are the keys to achieving these goals. To transcend from participating to fully invested, employees should be actively engaged in their retirement plan journey throughout the year. At BPAS, we're here to help make that happen. **From ready-to-share educational resources, to reports and sample communications, to a fully customized education strategy, we have you covered.**

Enrollment Kit

- The IRS requires basic [disclosure documents](#) to be provided to employees annually, or as changes arise. Many of these documents are located in the BPAS online enrollment kit.
- Access the online kit at no charge or order printed enrollment kits at just \$5 each.

BPAS Partner Toolbox

- Login to [toolbox.bpas.com](#) to find sample presentations, educational tools, videos, and hand-outs to help educate participants, generate mailings, get ideas, and help with enrollment.

Plan Level Reports

- Log into BPAS.com as a Financial Partner to access comprehensive plan reports.
- Use the Quarterly Plan Review Report (QPRR) to gauge overall participant engagement or review other reports to help build a targeted communications campaign, like:
 - Non-participants
 - Missing the match
 - Loans nearing payoff
 - Age 55 and over
 - Only invested in cash/stable investments

BPAS University

- Our proprietary online library at [u.bpas.com](#) offers free planning tools, calculators, videos, links, and more to help participants navigate the road to retirement. Providing easy to use tools and resources allows you to connect with participants on their level.
- Conducting an enrollment presentation? Walk participants through the calculators and videos to demonstrate the importance of saving.
- Discussing investments and asset allocation? Have participants complete the online risk tolerance quiz and discuss the results.

BPAS U Financial Wellness Center

Participants access their online BPAS account to find a wide array of free tools to help with budgeting, planning for college, getting out of debt, and more. As an advisor, you'll be able to share these tools with participants in group or individual sessions as a value-added service. It's pretty cool.

Prefer to outsource the educational component of the plan?

The BPAS dedicated team of Education Specialists will design a customized education strategy tailored to your plan's unique needs. With flexible billing options and an ERISA allowable expense, we're here to take participant engagement off your to-do list so you can focus on investment oversight and sales. We have your back.

Let's talk.

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