



IRA Custody and Recordkeeping Together. How Great is That?

Introducing IRAsselect

Here's a back-office solution that protects the retirement plan business you've built with a way to capture retirement plan outflows. IRAsselect is a low-cost option for all account sizes with full administrative support, record-keeping, statement delivery, tax reporting and disclosures. Plus, when you choose IRAsselect, there are no costly per account charges. IRAsselect supports your asset allocation model and even allows you to determine your own compensation.

Enjoy a single platform with:

- A low-cost rollover solution with easy-to-open accounts
- No fees for transfer and realignments
- Customizable portfolios on an IRA platform with reduced trading fees
- A fully-staffed, highly-trained call center with multi-lingual support
- Opportunity for participants to accumulate and retain sufficient retirement assets to retire with dignity

Full Compliance

- IRA Custodial and Disclosure Documents
- Quarterly account holder statements
- IRS and State Tax withholding and reporting (1099Rs, 5498s, 945s)
- Electronic prospectus / fact sheet hosting

Proven Technology

- Online account information so you and your clients can manage accounts anytime, anywhere.
- 24/7 online account access for account holders branded with your company logo
- An interactive voice response (IVR) system
- Seamless continuation of web login, user ID and PIN

BPAS Partnership

We take care of the day-to-day operations, so you can take care of the customer. At BPAS, we've been providing IRA Outsourcing for banks, trust companies and financial advisors since 1997. We are a proven leader in the retirement industry so don't worry. We've got your back.

Bottomline

Accumulate assets quickly with simplified rollovers, integrated custody and recordkeeping, and the best service in the industry. Most importantly, you can focus on making new relationships and managing money. Isn't that what you do best?

Ready to get started? Let's talk.



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