



Take Flight With Fiduciary Services



Establishing and monitoring your investment's flight plan takes time, knowledge, and expertise. Let our Fiduciary Services crew take the controls.

Today's regulatory environment and compliance challenges make fiduciary oversight more important than ever. Turn to the Fiduciary Services experts at BPAS for in-depth research, opportunity assessments, strategic planning, and the proven knowledge and experience to provide you with superior investment management services.

Fund Monitoring

With over 20,000 funds available and no proprietary funds or requirements, BPAS provides true investment flexibility. Our qualitative and quantitative fund monitoring program reviews your:

- Management team
- Expense ratios/fees
- Relative performance
- Risk-adjusted performance

Guided Navigation

Whether it's for an annual plan review, an audit, or your peace of mind, we've got you covered. BPAS will provide you with the resources needed to keep your plan's investment strategy in gear.

- Customized Investment Policy Statement (IPS)
- Quarterly economic and market review
- Quarterly fund monitoring report



As an experienced and flexible fiduciary, we customize services to meet your unique needs. Our crew oversees the investment flight plan so you can continue to maintain relationships and grow your business. Choose BPAS for your fiduciary services, then sit back and enjoy the flight.

Two Levels of Protection

ERISA 3(21) Investment Advisory
Shared fiduciary liability
Collaborate with BPAS for IPS
Funds scored based on adherence to IPS standards and criteria
BPAS reviews investment performance and suggest changes if needed
Annual performance review with plan sponsor
Quarterly market, economic, and fund review

ERISA 3(38) Investment Management
BPAS takes on maximum fiduciary liability
BPAS will manage IPS
Funds scored based on adherence to IPS standards and criteria
BPAS reviews investment performance and makes changes if needed
Quarterly performance review and commentary
Quarterly market, economic, and fund review



Questions? Let's Connect.



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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