

2024 Client Satisfaction Survey Results



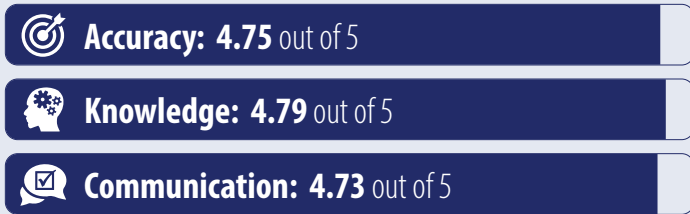
We asked 3,898 plan sponsors to rate their experience with BPAS on a scale of 1 to 5. We also asked for suggestions on what we could do better. Thanks to all of you who participated. Here are the results.

97% of clients are **satisfied** with BPAS
with **94%** being **VERY** satisfied

- ★ "We have utilized BPAS services with our 401(k) Plan for a few years now and have recently moved our Cash Balance Plan to BPAS as well. VERY pleased with the service and individuals involved."
- ★ "BPAS helps make the management of our 401k plan a pleasant experience which is greatly appreciated."
- ★ "We feel satisfied and grateful for the services provided by BPAS."
- ★ "All the service center employees have been so polite and helpful."

BPAS Plan Consultants Ratings

Average rating on a scale of 1 to 5



- ★ "A fantastic resource for me! She responds quickly to emails and is always there to assist!"
- ★ "The best consultant I have worked with over the many years I have done this."
- ★ "Very conscientious, very responsive, very helpful and very knowledgeable regarding all regulatory and plan aspects."
- ★ "She is always available for questions and happily walks through any information that needs to be covered with detail. We are so grateful to have her as our plan consultant she is truly outstanding!"



"Made our 401k plan process — enrollments, funding, etc. — so much easier... eliminates a lot of paperwork, simplifies processes, keeps us informed... 401k process is way more efficient."

"Participants like the new portal and the benefits of the Mile Marker program."
"The participant portal is robust and easy to use. The modeling tools are very welcome."



"Anytime one of our employees has a question, they come to me and we call together. The agents are always friendly, professional, and ready to help."

"The Portal is such a big upgrade compared to how we did things prior to BPAS."

"A huge improvement over the previous version. Navigation is far better and easier than ever before."



"BPAS overall takes ownership of most projects and makes life easier for (us)."

"BPAS has always been so helpful and patient with questions. BPAS is a great partner to work with!"

We're listening! Please keep the ideas and feedback coming.