



Simplified Solutions

At BPAS, we provide you with flexibility and expertise that you can count on to help grow your retirement plan business and meet your clients' needs.

We focus on delivering custom solutions using premier administration and recordkeeping technology, so your clients can save time, reduce plan headaches and build a program that truly helps employees save for the future. We provide you and your clients with a team of experts dedicated to navigating the complexities of retirement plans and collaborating with you on the best fit for each client.

Unique Approach

Retirement plans can be complicated. At BPAS, we are focused on simplifying the complicated by providing a full range of services to solve your plan challenges- without the need to engage multiple providers. These services, combined with our conflict-free open architecture platform, provide the support, versatility and experience you can depend on.

Work with experts focused on saving you time and reducing headaches.



Integrated

BPAS is more than just a recordkeeper. We are fully-bundled and act as your recordkeeper, administrator, custodian and clearing firm—all under one roof. We focus on all types of retirement plans and we have the expertise to service them well.

One Company. One Call.

- All Defined Contribution & Defined Benefit Plans
- Multiple Employer Plans/Trusts (MEPs/METs/PEPs)
- Plans with Employer Securities
- Puerto Rico 1081.01
- VEBA/HRA, HSA Services

We don't shy away from complex plans, so you don't have to either.



Streamlined

A core focus of our program is to take ownership over administrative matters, automate routine tasks, and make life easier for you and your clients. Through a team of experienced professionals and innovative technology we provide every plan with:

- Dedicated Retirement Plan Consultant
- Simplified Year-End Process
- Eligibility and Enrollment Tracking
- Loan and Distribution Services
- Vesting Updates in Real-Time
- Automatic Enrollment and Escalation Tracking

We take care of the plan details so you and your clients don't have to.



Committed

Our knowledgeable staff are distinguished by their quality, depth of ERISA experience and dedication to excellence. We deliver the kind of expertise and partnership you can count on to grow your business.

"They are exceptional professionals, they know their stuff, are very responsive, and provide A+ service."

C. Matthews - Advisor

"BPAS has reduced the time our HR team spends on our plan by more than 40% compared to our previous recordkeeper. We won't ever go back to the old way."

R. Desmond - Client HR Director

At BPAS, relationships matter.

Simplified Solutions



BPAS Services

Plan Administration & Recordkeeping	Bundled administration, recordkeeping, and custody for Defined Contribution Plans
Actuarial & Pension	Actuarial and consulting services for Defined Benefit, Cash Balance plans
TPA	Unbundled retirement plan administration services
VEBA/HRA & HSA	Full administration of VEBA/HRA, HSA, FSA, Transit and Parking plans
Fiduciary Support	3(16) Administrative Services Optional 3(21) and 3(38) Advisory Services
IRA Administration	Retail IRA services and statutory IRA rollovers
MyPlanLoan	Direct loan payment services for active and terminated participants

Hassle-Free

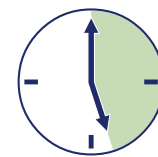
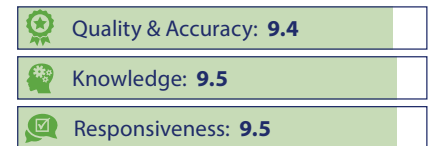
Retirement plans don't need to be messy. If you've been frustrated and disappointed with your retirement plan providers, call us. We will work to create a custom solution that meets your and your clients' needs.

2020 Client Survey Results



BPAS Plan Consultants

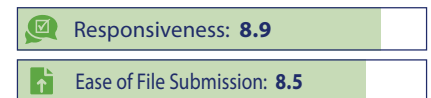
2020 Client Survey — Average rating on a scale of 1 to 10



45%
reduction of time
spent on plan with BPAS

BPAS Census Team

Average rating on a scale of 1 to 10



Ready to learn more? Let's talk.

866.401.5272 | trustsales@bpas.com | bpas.com



SERVICES: Plan Administration & Recordkeeping | Actuarial & Pension | Collective Investment Trusts | Fund Administration | Custody Transfer Agency | 3(16)/3(38) | Healthcare Consulting | IRA | HSA | VEBA/HRA | FSA

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