



DEDICATED SUPPORT &
RETIREMENT PLAN SERVICES
TO HELP YOU FOCUS ON
**WHAT
MATTERS
MOST**

We believe our unrivaled client experience stems from our desire to focus on what matters most to you. We understand goals differ within your company. Employers may find attracting, retaining, and rewarding key employees a top priority while employees may place more focus on the ability to retire on time. What matters most to your HR team might be the ability to manage fiduciary responsibilities and meet DOL and IRS requirements. At RPA, **what matters most** is our clients, so you can count on having the expert administrative support you need so you can turn your focus back to **what matters most.**

WHAT MATTERS?

WHEN YOU FOCUS ON **WHAT MATTERS MOST**, A COMMON THREAD BEGINS TO EMERGE. EVERYONE IS WORKING TOWARDS THE SAME GOAL: *RETIREMENT*

It takes more than a traditional approach to inspire meaningful retirement outcomes. We're willing and able to dedicate the time, energy, and resources needed to help your employees save for retirement and meet your company goals.

RELATIONSHIPS

Matter

We place a high value on long-term relationships. When you work with RPA, you become family: your dedicated Certified Pension Administrator will know you by name, the intricate details of your plan, and your plan participants.

- » Single point of contact devoted to your plan
- » Dedicated local teams
- » Strong strategic partnerships
- » Family-owned since 1969

QUALITY

Matters

We provide exceptional service with unwavering support. We will never compromise quality of service to compete on price, and you'll reap the dividends by avoiding steep penalties and fines that are risked when selecting lower quality providers.

- » Proven history of positive audit outcomes
- » Over 95% client retention rate
- » Multi-level quality assurance review

SECURITY

Matters

The plan you provide to employees should be a benefit, not a source of stress. We work to protect the valuable assets and data within your plan and keep them out of hackers' reach.

- » Secure data handling and storage
- » Advanced IT structure
- » Cybersecurity Insurance Policy

COMPETENCY

Matters

When you partner with RPA, you place your trust in a team that demands excellence. RPA employs some of the most experienced and talented pension professionals in the retirement plan industry.

- » RPA hires only senior talent with long tenured careers
- » Continuing education is required
- » Focused on sharing knowledge and educating clients
- » All employees possess industry certifications

OUTCOMES

Matter

Our dedicated team understands the ins and outs of the IRS tax code and ERISA. We use that knowledge to custom tailor plans to maximize contributions, optimize tax strategies and focus on retirement outcomes.

- » Maximize saving opportunities
- » Enhanced tax strategies
- » Retirement readiness for all employees

INTEGRITY

Matters

Honesty and transparency are at the heart of everything we do. For us, integrity means doing the right thing, consistently, for our clients.

- » We will always stand behind our work
- » Fee transparency
- » Our solid reputation in the industry is built on our proven integrity



CUSTOM PLAN DESIGN

Your company and its specific strategy for executive benefits make your retirement plan unique; there is no reason for you to settle for an off-the-shelf plan document. We have decades of experience creating custom retirement plans based on the unique demographics, financial resources, and philosophies of our clients. Plans are designed to maximize value for both employers and employees alike. Our expertise will help you maximize saving opportunities and discover pre- and post-tax advantages as well.

PLAN CONSULTING SERVICES

We are experts who can provide a wide range of retirement plan consulting services. RPA's experts can help whether you need assistance recovering a plan that is out of compliance, testifying at the IRS, revising a plan design, or providing sponsor guidance.

PLAN COMPLIANCE ADMINISTRATION

Woven into the fabric of America's retirement plan landscape is a complicated labyrinth of rules, regulations, and administrative procedures. Failing to completely conform with these regulations, even by accident, can result in steep penalties and adverse tax consequences – all fully avoidable with the proper preparations and support. For over 40 years, we've lessened the burden our clients bear and ensured their retirement plans are in full compliance with ever-changing government regulations.

PAYROLL CONTRIBUTION SOLUTIONS

A major source of stress for HR personnel is the process of uploading timely payroll contributions, which is why, we offer two client options that assume the responsibilities of your human resources department. We provide seamless and timely upload submissions.

WHAT'S YOUR PLAN?

RPA's experience and knowledge extends across the entire spectrum of today's retirement plans. Whether you are starting a new plan or have a large, established program already, we have the expertise and resources to support all your retirement plan needs.

- » 401(k) Plans
- » 403(b) Plans
- » 401(a) Plans
- » Profit Sharing Plans
- » 457(b) Government Plans
- » 457(b) Non-Profit Plans
- » Defined Benefit Plans
- » Cash Balance Plans
- » SIMPLE 401(k) Plans
- » Money Purchase Plans
- » Cross-tested Plans
- » Prevailing Wage/SCA Plans

PARTNERING TO REACH YOUR GOALS

We help you build a retirement plan that makes the most sense for your company; one that you can rest assured is compliant and meets your company objectives.



*“The bitterness of poor quality remains long after the sweetness of low price is forgotten.”
Benjamin Franklin.*

FROM OUR FAMILY *to yours*

Founded over 40 years ago, RPA has grown one plan at a time to become one of the largest retirement plan providers in the Mid-Atlantic region, with over 1,000 retirement plan clients.

RPA has earned a distinguished reputation as a full-service retirement plan provider of cost-effective and hassle-free compliance administration. We provide comprehensive compliance services featuring everything you need to make your plan a success, including state-of-the-art technology, a dynamic website, and integrated payroll processes.

We are committed to providing the expert administrative support you need so you can turn your focus back to **what matters most to you.**



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