



Find administrative relief without sacrificing your business or service levels.

Taking care of your clients, growing your business, and supporting your staff are key components of any organization, but it's no surprise that being successful at all three can be costly—both in time and money. That's why we provide a full suite of outsourcing services throughout the country to third-party administrators (TPAs) looking for a little more help achieving growth goals while still providing excellent service to their clients.

We help you help your clients and prospects—all in the background.

We get it—plan sponsors value a local TPA that understands their organization. That's why we work in the background to help keep your business running smoothly so you can focus on nurturing those relationships (and building new ones).

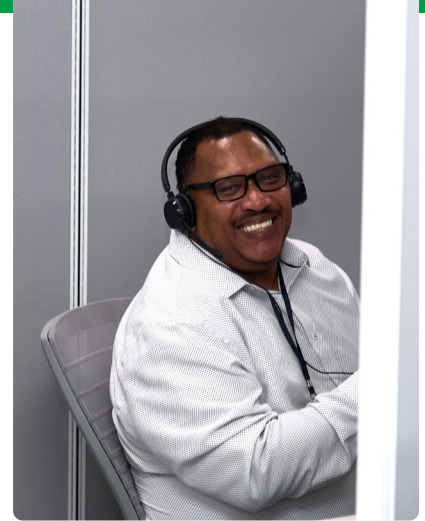
- Keep up with client demands and ever-changing technology
- Relieve backend administrative burdens so your team can focus on growth
- Find new and effective ways to achieve service goals without a hit to your budget

TPA Outsourcing Services

- Compliance Data Center (CDC) plan sponsor web portal for census data collection
- A TPA Dashboard that is used to manage year-end compliance tasks and document all communications with our outsourcing staff
- Trust Accounting
- Contribution Calculations
- Compliance Testing
- 5500 Preparations
- Distribution and Loan Processing
- Plan Documents

About Us

Simply put, we are one of the nation's largest independent, privately held firms specializing in employee benefits, retirement plans and all their associated compliance needs. Since 2008, we have grown by acquiring over 60 local and national firms that have been trusted members of their communities for decades. Independently certified as a "Best Places to Work — USA" company, we currently serve more than 18,000 employer groups and 3.6 million plan participants nationally.



Partner with People Who Know TPAs

A National Footprint with Over 35 Locations
and deep relationships with all the national carriers of the leading insurance products.

7,000+
Plans
Supported

300+
Professionals

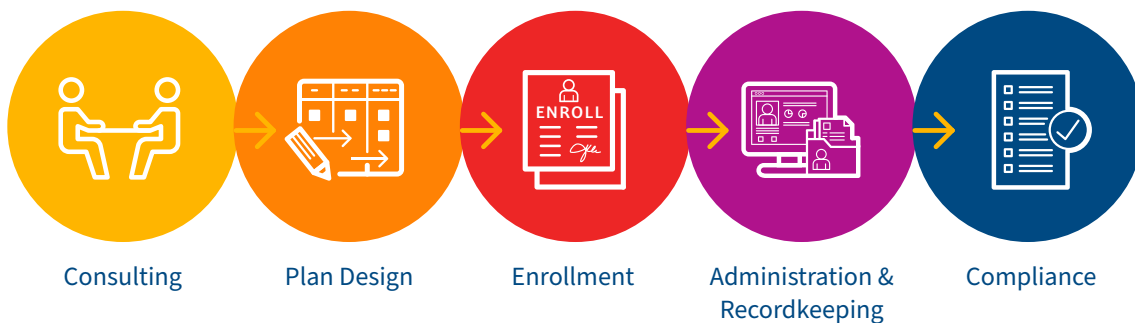
\$900M
Premiums

35% Average cost savings for TPA Clients since 2000.

There is a reason for our above-industry-average client revenue retention rate. It's our passion for our clients and partners.

Our Approach

Combined with proprietary easy-to-use technology.



Our Difference

We are on a mission to make it all simpler and enable you to offer more to your new and prospective clients. Helping you take care of the health and financial wellness of your clients' #1 resource — their people — today and tomorrow.

Let's have a conversation.
It's that simple.