RPA
RETIREMENT PLAN ADVISORS
THE FUTURE IS BETTER THAN YOU THINK

THE RPA SERVICE MODEL

The Future is Better Than You Think

We believe a great retirement plan provides services which allow participants to access their plan in the way most comfortable for them. Our decades of public sector experience have taught us that investors generally fall into three categories: Do It Myself, Help Me Do It, and Do It For Me. Our service model addresses the needs of all three types of investors.

DO IT MYSELF

RPA provides the Do-It-Yourselfer with the tools needed to build a portfolio and manage their investments.

- Investment menus covering a broad range of asset classes
- Investment performance reports
- Fund fact sheets
- Online planning tools
- 24/7 toll free number and Internet access

Of course, they still have access to their RPA financial advisor just in case they have questions!

HELP ME DO IT

For those participants who want or need help, we provide:

- On-site service visits, including group and individual meetings
- Individual retirement counseling
- Investment recommendations

In this model, while we offer help and advice, the participant ultimately makes the decisions and is responsible for the ongoing monitoring and trading of their investments.

DO IT FOR ME

More and more participants are asking, "Can you just do this for me?", and the answer is YES! Retirement Plan Advisors' Portfolio*Plus* program is an optional, fee-based managed account service specifically designed for public sector retirement plans. Participants delegate the ongoing responsibility of managing their retirement account to RPA's investment professionals. With Portfolio*Plus*, RPA:

- Identifies your risk tolerance
- Recommends a portfolio
- Selects your investment options
- Provides ongoing active account management to respond to market opportunities while managing portfolio risk

RETIREMENT PLAN ADVISORS

www.retirementplanadvisors.com

RPA specializes in public sector Deferred Compensation and Defined Contribution retirement plans. Our unique focus on employers of all sizes provides you the same high-quality retirement plans and advice found on Wall Street. We proudly serve more than 600 plans with 50,000 participants and $3.5 billion in plan assets. You don't need more work. You need RPA.

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