

Employer Plan Service Packages

Employer Plan Consulting

RPAG Tools	Sales Accelerator* \$100/mo	RPAG membership packages	
		Silver \$200/mo	Gold \$500/mo
RPAG Advisor Web Portal	✓	✓	✓
Client and Prospect CRM		✓	✓
The Scorecard System™ (Fiduciary Investment Review)	✓	✓	✓
Fund Research		✓	✓
Plan Asset Link (PAL)	✓	✓	✓
Phone, Email and Virtual Support		✓	✓
RPAG onboarding support		✓	✓
RPAG Custom Solutions/CITs		✓	✓
Resource Center		✓	✓
Video Learning Center and Ongoing web-based training		✓	✓
Fiduciary Fitness Program		✓	✓
Fiduciary Briefcase		✓	✓
TDF Analyzer			✓
Stable Value Analyzer			✓
Fund Mapping			✓
Batch Reporting/Batch Considerations			✓
Live-Bid Provider Analysis			✓
Advisor Fee Calculator			✓
PLANavigator			✓
Corporate Sales Support			✓
Client Service Plans			✓
Enhanced Content Marketing			✓
Automated Meeting Notes			✓
PlanFees Benchmarking	✓		✓
RFP Express	✓		✓
ERISApedia	✓		✓
Add-ons: Retirement Learning Center Direct – \$200/mo (1 year contract required - billed separately from packages) WellCents – \$2,400/year (billed separately by RPAG)			

Items included in each service package are indicated with a ✓ | Lite Access (available to all advisors) includes access to the Web Portal, the Plan Asset Link (PAL), and the ability to run Quarterly Reviews only. Email employerplans@osaic.com if you need a log in for Lite access. | *Sales Accelerator does not include an RPAG membership – [Learn more about Sales Accelerator](#).