



Retirement Plan Advisory Group

Retirement Plan Advisory Group (RPAG) was designed, built, tested, and optimized to provide you with the efficiency, scale, reporting, and data that you need to successfully manage and grow your employer retirement plan advisory business.

Seamless report creation

Quickly create and pull an array of fiduciary reports for your yearly plan performance check-ins.

Increased efficiency

Free up hours of time on requests for proposals (RFPs), and benchmarking plan fees and expenses.

Business growth

Grow your business using best-in-class prospecting software and FINRA reviewed practice management materials.

What's included?

- Investment analysis
- Fiduciary education
- Sales & marketing support
- Financial wellness program
- ERISA compliance
- Collective trusts
- Plan design
- Fee benchmark
- Live quotes from more than 40 Providers

Each subscription will cover seven individual logins¹. RPAG has several add-ons available for an extra cost. Osaic has packaged these together to ensure you get maximum savings and a best-in-class experience. Below are some of the add-on features available.

RFP Express	Get quotes from more than 30 providers for your opportunity in days, if not instantly.
ERISApedia	Premier prospecting tool used to find opportunities.
Fiduciary Briefcase	Vaulting capabilities for keeping plan records in an organized fashion.
Plan Fees	Uses a Universe of Averages report to benchmark your plan if not going out to bid.

Contact Employer Plan Consulting for pricing

employerplans@osaic.com
833-204-5525, option 5

¹ Subscription costs can be split among you and other financial professionals in your office. The subscription price will be determined by what tier you choose.