



Our retirement planning process includes flexible investment solutions, access to personalized assistance and an education continuum. We work with each individual to educate them regarding their retirement plan and our team has the experience to educate regarding long-term investment strategies in all kinds of markets.

Corporate Financial Management Services

Corporate Retirement Services

Retirement Planning

- 401(k) Education

Financial Planning

Income Protection

- Life Insurance
- Disability Income Insurance
- Long-Term Care Insurance

Wealth Transfer

- Estate Planning

Investments

- Mutual Funds, ETFs, Stocks, Bonds, CDs, etc.
- Variable Annuities, SPIA, DIA
- Individual Retirement Accounts (IRA), Roth IRAs
- Asset Allocation Programs

The Details

Defined Contribution Plan Services

- Fiduciary Support
 - Annual Fiduciary File
 - Fiduciary Fitness Program
- Ongoing Plan Review
- Education for Plan Sponsors – DOL Audit Process
- Participant Engagement

Defined Benefit Plan Services

- Asset Allocation
- Liability-Driven Investment Analysis

“Non-Qualified” Plan Services

- Plan Design
- Legislative Compliance
- Managing Asset/Liability Relationship
- Education for Executives

Company Ownership Capabilities

- Employee Stock Ownership Plan (ESOP)
- Business Succession Planning
- Buy/Sell Planning

Larry, Bert, Jeff, Al, Jordan and Brian provide a variety of services to retirement plan sponsors through their registrations with Principal and a relationship with RPAG. While they may act as a 3(21) fiduciary, helping a plan sponsor meet their obligations, they do not act with discretion. They do not act as 3(16), 3(38) or in other ERISA fiduciary capacities. Services being provided are not intended for plan participants. The tools and services provided by RPAG are not endorsed by Principal.

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