



RPAG Alliance Membership

Plan sponsors place high value on performance and trust in a relationship. That's why Strategic Financial Solutions is also a member of Retirement Plan Advisory Group (RPAG) (a wholly owned subsidiary of NFP)—to offer with conviction one of the clearest choices in retirement plan consulting firms. Strategic Financial Solutions is a member of one of the nation's leading alliance of accomplished advisors, whose knowledge, expertise and ingenuity combine to create tangible value for sponsors and participants of qualified and nonqualified retirement plans.

Benefits to Plan Sponsors

As one of the nation's largest provider of practice management resources for retirement plan consultants, RPAG works alongside SFS to help empower and equip their practice with research, technology and delivery systems that produce measurable results. For you, it can mean the welcomed confidence of:

- 360° metrics on investment due diligence, plan compliance, and fee benchmarking
- Shared knowledge and applied analysis
- Non-alignment with any single plan provider for impartial, objective, and balanced advisory services

Advisor Performance

RPAG members are some of the most respected in the retirement plan consulting industry. Here's why:

- Strategic and tactical expertise above industry standards
- Professional energy, efficiency and effectiveness
- Inspired to listen, understand, interact in a meaningful way
- Deliver best practices and execute with discipline

RPAG Resources

Strategic Financial Solutions helps you maintain full plan accountability through RPAG's advanced systems and processes that are governed by a robust technology platform. The RPAG platform is utilized by over 400 member firms that collectively account for over \$500 billion in assets under influence as of September 1, 2019 and service over 40,000 plans. Count on these technology benefits:

- Proprietary Scorecard System™ delivers quantitative and qualitative metrics on the entire universe of 25,000+ 30 asset classes and dozens of investment platforms
- Fiduciary Fitness Program™ for holistic plan compliance to better protect fiduciaries and prepare plan participants
- B3 Provider AnalysisSM for unparalleled fee, service and investment benchmarking of over 100 service providers

Financial professionals provide a variety of services to retirement plan sponsors through their registrations with Principal and a relationship with RPAG. While the professionals 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. Tools and services provided by RPAG.

Insurance products issued by Principal National Life Insurance Co. (except in NY), Principal Life Insurance Co., and the companies available through the Preferred Product Network, Inc. Securities and advisory products offered through Principal Securities, Inc., 800/247-1737, member SIPC. Principal National, Principal Life, the Preferred Product Network, and Principal Securities, Inc. are members of the Principal Financial Group®, Des Moines, IA 50392. Larry Witzel, Bert McClintock, Al Eckhoff, Jeff Haugse, Jordan Kuehner and Brian Brandt, Principal National and Principal Life Financial Representatives, Principal Securities Registered Representatives, Financial Advisors. Strategic Financial Solutions and RPAG are not affiliates of any company of the Principal Financial Group®. 1319847-012021