



Why Partner with RPCSI as Your **Retirement Plan Consultant**

RPCSI is locally-owned and customer-driven. By providing pension-related services to local-area clients, as well as nationwide clients for over 25 years, we have proven that we are committed to being an industry leader. We offer administrative services to a wide array of retirement plans nationwide, spanning a multitude of clients in different business organizations and industries.

WHAT WE DO



RPCSI is an independent firm that does not sell investments. We work on a fee-for-service basis and are not affiliated with any Insurance Companies or Financial Organization.

However, we have built strong alliances and relationships with selected Financial Advisors and Investment Companies to be able to offer our clients a solid and resourceful network that takes care of all aspects of a company's retirement plan.

OUR GOAL



We strive to provide comprehensive, timely, high-quality administrative and technical services to Retirement Plan Sponsors — making their jobs easier.

Our mission is to be the industry leader in consulting, administration and record keeping services for our clients with regard to their qualified retirement plans.

10319 Dawsons Creek Blvd. Suite A, Fort Wayne, IN 46825

RPCSI.com | 260.484.0848



Company Profile

An Introduction to RPCSI



CORE BUSINESS

Retirement Plan Concepts & Services, Inc. was founded on January 1, 2000. It is the largest, locally owned Retirement Plan Consultant and Qualified Retirement Plan Consulting Firm in Northern Indiana. We service over 900 clients, 95% of which are 401(k) Plans.

SERVICES

RPCSI Services Include (but are not limited to):

- Consulting on Mergers & Acquisitions as they relate to Qualified Plans
- Consulting on Qualified Plan Design
- Qualified Retirement Plan Implementation
- Retirement Plan Administration Services:
 - Participant Record-keeping
 - Distribution Processing and Reporting
 - Loan Processing and Tracking
 - Non-Discrimination Testing
 - Government Reporting



KEY FACTORS

- We hold the CEFEX Certification, which is the highest designation in the industry. We are one of only two CEFEX certified RPCs in Indiana
- We are members of ASPA and NIPA, through which we remain active in educational conferences and exam programs
- Our team, with over 275 years of combined experience, is comprised of nine ASPPA designated QKAs, one IRS-designated ERPA, and a qualified support team of 28 individuals



The Six Keys to RPCSI's Unique Service

Independently, Locally-Owned and Operated

Clients have direct access to the president of the company and we are invested in our community.

One Point of Contact for Each Client

Each client is assigned an ERISA Consultant who is 100% accountable for the servicing of their plan. This consultant works directly with the Investment Provider and Financial Advisor.

Compliance Expertise for Retirement Plans

We work with clients to ensure their retirement plan is meeting their corporate goals and remaining compliant with ERISA law and adhering to changes required by the IRS.

ERISA Consultants have Incentive Based Pay

Consultants have a vested interest in providing exceptional service. They are incentivized to provide exceptional service that ensure client retention.

High Internal Service Standards

Service standards and turnaround times are monitored and evaluated regularly. Client satisfaction surveys are used to improve servicing standards.

ERISA Consultants have Incentive Based Pay

This ensure that each participant's account is accurate at the end of each plan year. In this process, we catch and correct errors at the participant level, before errors become complicated and costly.





What s CEFEX

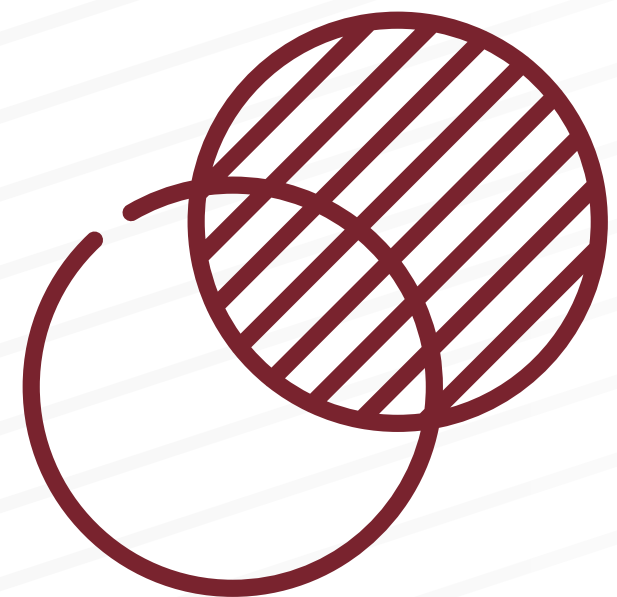
Certification Means to Our Partners

As a CEFEX Certified Retirement Plan Consultant, we can guarantee that our company is:



1. ETHICAL

All business practices and procedures are held to the highest ethical standards.



2. TRANSPARENT

All fees and service charges are clearly defined and accurately tracked.



3. EDUCATED

All employees regularly attend educational courses, allowing them to stay abreast of current industry trends and provide accurate services to clients.



4. METICULOUS

All services undergo detailed, multi-step processes designed to catch and correct any errors, resulting in accuracy for all documents, plans and procedures.



5. COMPREHENSIVE

All plans receive extensive support for DOL and IRS audits, are managed within strict government processes, and are maintained to ensure accuracy and compliance.



5 Reasons You Should

Partner with RPCSI

1

We are the Premier Local Retirement Plan Firm

We are locally-owned and invested in the community. We want Employers and Employees to retire on their own terms.

2

We Inspire Trust

With a focus on proper procedures and a multi-step processes to reduce errors, we are dedicated to eradicating costly plan mistakes.

3

We Exceed Expectations

By assigning dedicated consultants, serving as employer advocates with the government, and managing vendor revenue to the benefit of the client, we strive to provide the highest quality customer service.

4

We Expand Business

Through sales assistance, technical resources, and plan design illustrations, we serve as a trusted partner that enables clients to succeed and grow.

5

We Manage Your Retirement Plan So You Can Manage Your Business

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