

# Objectivity and Attention of an Independent Advisor, Strength and Resources of a National Leader

Plan sponsors place high value on performance and trust in a relationship. That's why Chartered Financial Services, Ltd. joined **Retirement Plan Advisory Group**—to offer *with conviction* the clearest choice in retirement plan consulting firms. Chartered Financial Services is a member 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 the nation's largest provider of practice management resources for retirement plan consultants, RPAG works alongside Chartered Financial Services to empower and equip their practice with research, technology and delivery systems that produce measurable results. For you, it means 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, recognized each year on industry lists that include the Top 300 Most Influential and Top 20 Rising Stars. 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

Chartered Financial Services maintains 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 465 member firms that collectively account for over \$150 billion in assets under influence and service over 28,000 plans. Count on these technology benefits:

- Proprietary **Scorecard<sup>SM</sup> System** delivers quantitative and qualitative metrics on the entire universe of 25,000+ funds and dozens of investment platforms
- **Fiduciary Fitness Program<sup>TM</sup>** for holistic plan compliance to better protect fiduciaries and prepare plan participants
- **B3 Provider Analysis<sup>SM</sup>** for unparalleled fee, service and investment benchmarking of over 100 service providers
- 24/7 access to detailed plan performance reports through the **Fiduciary Briefcase<sup>TM</sup>** virtual online portal