

# Why FuturePlan?

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We transform plan design and administration challenges into extraordinary results.



# We understand your challenges.

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**From prospecting for new clients to retaining and householding, we align with every step of your sales cycle. We provide creative plan design options, customized proposals, and practice management tools along the way.**

We're a category of one: the only TPA offering a full spectrum of creative plan design, strategic consulting, IRS and DOL regulatory compliance services, actuarial practice, and end-to-end plan administration for every plan, with complete independence and flexibility. We are a technologically advanced national organization with the heart and soul of a hands-on business partner.

**Only FuturePlan can help you deliver more  
of what small- and mid-sized retirement plan  
sponsors need and want.**

**Let us put our unique offering to work for you.**

# Together, we can pursue a noble purpose – and transform the lives of millions.



**51,000+**  
plan sponsors  
served from coast  
to coast



**82**  
national sales consultants  
trained in plan design,  
covering every state



**460**  
credentialed retirement  
professionals, 60 actuaries, and  
largest in-house ERISA desk



**\$109**  
billion AUA



**30+**  
recordkeeping  
partners



**1500+**  
skilled team  
members



**30**  
locations  
across the U.S.

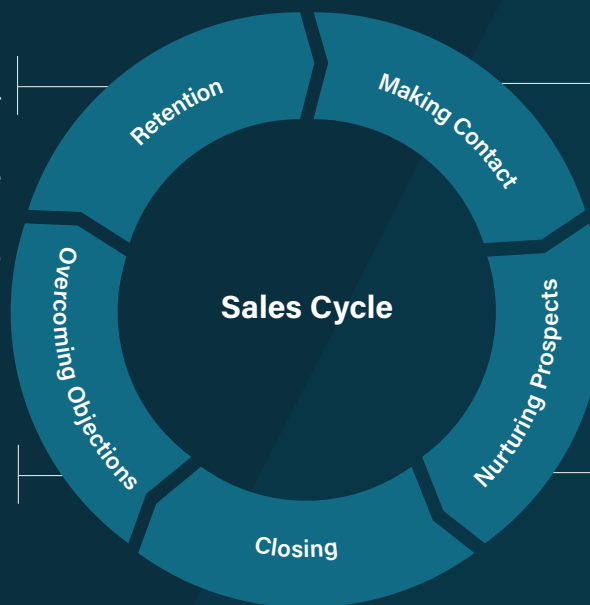
Independent and conflict free

Enterprise-level security and technology

## Let us help you work smarter, not harder to grow your practice.

We protect your plans with careful compliance which enhances your reputation. 50% of TPAs surveyed reported average client tenure of 6–9 years, with many reporting client tenures of 10–20 years.

Potentially lower fees for your clients, act as 3(16) fiduciary to ease client administration burden, create efficiencies with our technology, and quell client concerns with best-in-class cybersecurity.



As an extension of your sales team we're deeply knowledgeable about plan design, and our administration capabilities free you up to focus on client relationships.

Our unique and hyperlocal market insights give you competitive advantage.

Creative plan design, out of the box thinking, and your go-to technical resource for finals presentations.

## Centers of Excellence to Give You a Competitive Edge

Cash Balance Plans

ESOP

Actuarial

Prevailing Wage Plans

3(16) Fiduciary Services

Tribal Plans



### Expert service for every plan type:

- 401(k), 403(b), 457 and all defined contribution plans
- Traditional defined benefit plans
- Solo(k) and solo DB
- Nonqualified deferred compensation plans



Contact us today to find out how we can help achieve your goals and give you a competitive edge in a rapidly changing and ever more complex retirement plan landscape.

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**futureplan.com**

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