



United  
Retirement Plan  
Consultants

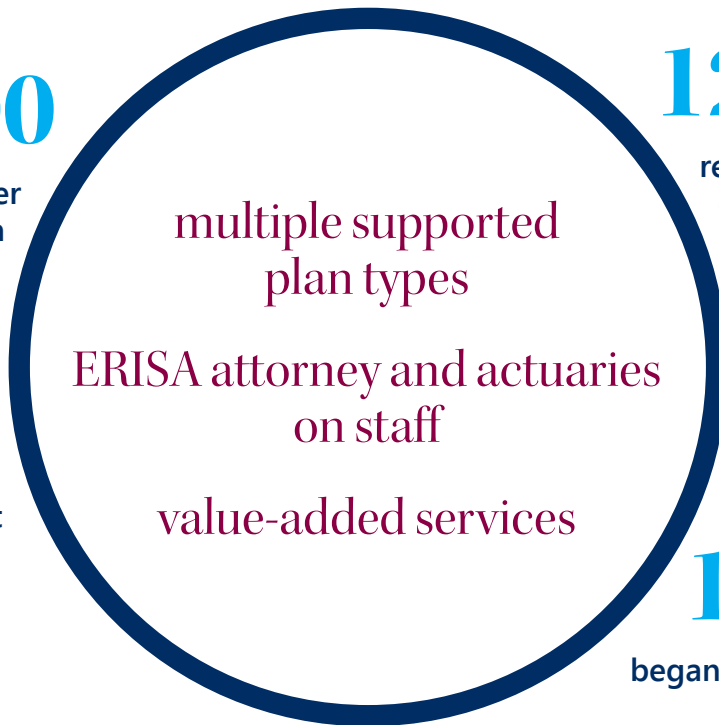
## We're more than a TPA. We're retirement strategists.

National firms deliver reliability, confidence and security but lack the accessibility, service and relationships of a local TPA. **At URPC, we're both.** We leverage our national footprint with local expertise to deliver best-in-class retirement plan solutions. **That's the United Retirement difference.**

### *The power of national—delivered locally*

**8,500**  
plans under  
administration

**\$11**  
billion in plan  
assets under  
management

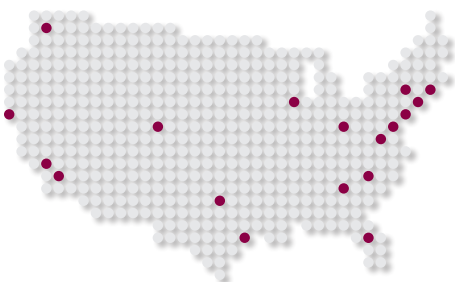


**12**  
regional sales  
consultants

local offices

**200**  
retirement  
professionals

**1974**  
began administering plans



URPC's G3 Promise—great people • great service • great price

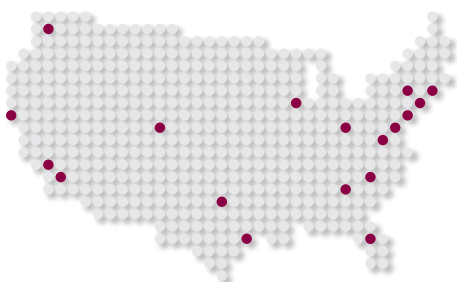
Contact your local Sales Consultant or our Internal Sales Consultants for plan design consultation, illustrations, fee quotes and proposals.  
SalesSupport@UnitedRetirement.com • (855) 439-6709

[www.UnitedRetirement.com](http://www.UnitedRetirement.com)



In addition to plan administration, URPC is proud to offer the following value-added services:

Services	Description
<p><b>3(16) Select Fiduciary Administration Support Services</b></p>	<p>Platinum services include:</p> <ul style="list-style-type: none"> <li>• Outsourced fiduciary liability</li> <li>• Form 5500 signed and submitted</li> <li>• Participant notices distribution</li> <li>• Participant distributions approval</li> <li>• Ensure plan operation follows plan document</li> <li>• Track employee eligibility</li> <li>• Maintain signed plan documents</li> <li>• Upload contribution file to recordkeeper</li> <li>• <i>Lower service models available</i></li> </ul>
<p><b>Document Maintenance Program (DMP)</b></p>	<ul style="list-style-type: none"> <li>• Low annual fee</li> <li>• Includes discretionary amendments</li> <li>• Includes legislative amendments</li> <li>• Includes plan restatements</li> <li>• Includes safe harbor notices</li> </ul>
<p><b>Payroll Upload Service/Payroll Select</b></p>	<ul style="list-style-type: none"> <li>• Flexible service levels</li> <li>• Provides 360 integration between recordkeeper and payroll provider</li> <li>• Available as standalone service with Silver and Gold 3(16) service.</li> </ul>
<p><b>401kInABox</b></p>	<ul style="list-style-type: none"> <li>• Online service model</li> <li>• Discounted administration fees</li> <li>• Automated recordkeeper paperwork collection</li> <li>• Supports solo(k), safe harbor and 401(k) plans</li> </ul>



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