

# PENTEGRA Quick Facts

Retirement plan and fiduciary services for better plan outcomes

Pentegra is a fiduciary first.

Pentegra is one of America's oldest, most experienced independent institutional fiduciaries. In fact, we were built to be a fiduciary. We were founded some 80 years ago as a Named Plan fiduciary—long before the role formally existed under ERISA. Our heritage as an institutional fiduciary guides everything we do, delivering a high standard of care and deep expertise to drive successful retirement plan outcomes.







## Our History

- An 80 year legacy serving as an institutional fiduciary
- More than \$13 billion in assets under administration/management
- Serving more than 30,000 complex retirement plans with over one million participants
- A level of fiduciary expertise and oversight unmatched in the industry today
- One of the largest and most experienced Multiple Employer Plan (MEP) providers in the nation
- An independent fiduciary organization
- A board of directors comprised of our clients; we answer to those we serve



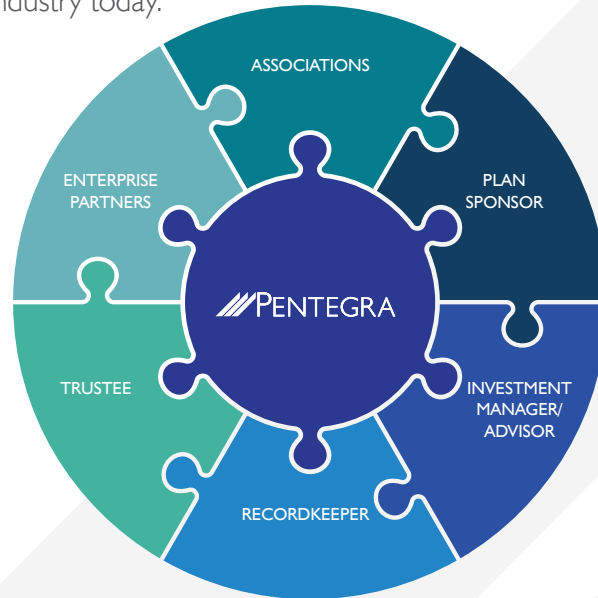
## Fiduciary Legacy

- As a fiduciary, we provide expert oversight and in-depth knowledge, shouldering much of the work and assume legal responsibility for managing a retirement plan.
- Clients have the assurance of knowing their plan is well designed, well managed, and compliant and enjoy the confidence of working with experts who are impartial and always put the client's interests first.
- Plan sponsors and participants, advisors and professional partners enjoy a higher level of protection—and the peace of mind that having a professional on board delivers.

| Flexible and Scalable Solutions for Every Opportunity   |  |   |   |
|---|--|---|---|
| RETIREMENT PLANS we manage  | PLAN DESIGNS we support  | FIDUCIARY ROLES we perform  | SERVICES we offer   |
| <p>Defined Benefit Plans, including traditional Pension Plans, Cash Balance Plans and Other Hybrid arrangements</p> <p>Defined Contribution Plans, including 401(k), 403(b), Profit Sharing Plans and ESOPs</p>  | <p>Single Employer Plans</p> <p>Multiple Employer Plans (MEPs)</p> <p>Pooled Employer Plans (PEPs)</p> <p>Association Retirement Plans (ARPs)</p> <p>Group Plan Arrangements</p>  | <p>Named Fiduciary</p> <p>3(16) Fiduciary Administrator</p> <p>Trustee</p> <p>3(38) Investment Fiduciary</p>  | <p>Third Party Administrator (TPA) Services</p> <p>Plan Design Consulting</p> <p>Retirement Plan Benchmarking &amp; Competitive Positioning</p> <p>Regulatory &amp; Technical Consulting</p> <p>Actuarial Consulting</p> <p>Institutional Investment Consulting</p>  |

## Your Partner in Success

We design retirement plans in the best interest of the clients we serve. That's why we work in partnership with plan sponsors and trusted advisors, or at the enterprise level, with recordkeepers, trustees and investment management firms, who have already formed a relationship with the plan sponsor. In fact, we work with nearly every major recordkeeper and trustee in the industry today.



## Expertise You Can Depend On

Our reputation for excellence attracts top industry professionals. The average tenure of our client-facing team members is 15+ years, and 60% hold an advanced degree or credential. This means you work with a dedicated team of knowledgeable and seasoned professionals who develop a deep understanding of a client's plan.

We help you stay up-to-date in this complex and highly-regulated industry.



Visit us at [www.pentegra.com](http://www.pentegra.com) or contact the Pentegra Solutions Center at [solutions@pentegra.com](mailto:solutions@pentegra.com) or 855-549-6689.

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