

RETIREMENT SERVICES

# ADP

*Always working for you*



Always Designing  
for People™

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*"For over 70 years, ADP has served as a trusted human resources, payroll and benefits partner to employers around the world. Our mission is to provide insightful solutions that drive value and success for our clients by allowing them to focus on their business."*

**- Carlos Rodriguez, President and CEO**



## History of stability

ADP began as a local New Jersey business in 1949, and has expanded internationally to become one of the world's largest business-to-business outsourcers with 58,000 associates worldwide.

We were the first in Human Capital Management to deliver automation, move to the cloud, provide a mobile app, and create an online marketplace, clearly leading the industry in innovation. We have a legacy of innovation and service that gives us a profound understanding of the employee experience and we are dedicated to responding to changing workforce needs with insights and solutions. Our integrated technology platforms, data analytics, and strategic guidance in all aspects of human capital management, allows us to continue to meet our clients' needs and shape the future of work.

The world has changed since we first began our company and we have continued to change with it. Today's digital landscape means limitless possibilities, and also complex security risks and threats. At ADP, security is integral to our products, our business processes and our infrastructure. We maintain the highest levels of data security and privacy, and educate and empower our clients to take measures to reduce risk.



## ABOUT ADP

- Founded 1949
- \$14.2B USD revenue 2019
- 58,000 associates
- 810,000 clients in 140 countries
- 80% of Fortune 500 are clients
- \$2.1T moved in client funds in the U.S. in FY19
- Over 40 million worldwide (1 in 6 workers in U.S.)
- Exceptionally strong AA / Aa3 credit rating from Standard & Poor's® and Moody's®
- \$911M R&D spend in FY19
- Awards: HR Executive Awesome New Technologies, (2015-19), World's Most Admired Companies (2006-2020) 14 consecutive years, FORTUNE

## What we offer

We have solutions for organizations of any size and the industry experience to address the challenges that businesses face daily.



**Human Resources** – From best practices to advice and HR consulting.



**Benefits & Insurance** – Employee benefits, flexible administration and business insurance.



**Talent** – From recruitment to retirement, getting the very best out of your people.



**Payroll** – Our online store for HR apps and more; for customers, partners, and developers.



**ADP Marketplace**<sup>1</sup> – Participants have access to a variety of apps that can help them improve their financial literacy, manage debt, save for retirement and more.

<sup>1</sup> The ADP Marketplace is a platform offering a variety of Human Capital Management (“HCM”) applications and services, including financial planning applications, many with pre-built integration to ADP offerings to clients of ADP, LLC. Third party applications, services and integrated solutions are not recommended or vetted by ADP Retirement Services and are not affiliated with ADP Retirement Services, ADP Broker-Dealer, Inc., ADP Strategic Plan Services, LLC.



## ADP Retirement Services

Offering a 401(k) plan is a valuable benefit that can help make businesses stronger because it's an important part of a competitive benefits package impacting both recruiting and retention. ADP entered the retirement business and has had a dedicated division since 1989. With the deep experience and knowledge to make plan administration easy, we will work with businesses from plan implementation to optimization. We are here to help businesses design a plan that will work best for them and help employees achieve retirement readiness.

## Digital tools and support

As a reminder, we have a number of technological resources available to support plan sponsors and participants:

**Plan Health dashboard** – A customizable dashboard so sponsors can display the plan information and data that is most important to them

**Plan Health reporting** – Printable and easy to use comprehensive reports that allow plan sponsors to review important metrics at-a-glance, measure plan effectiveness, compare current data to prior period and customize plan benchmarks.

**Compliance Dashboard** – Sponsors have access to a new compliance experience that makes understanding test results easy and submitting corrective actions simple and fast.

**ADP Mobile App** – Participants can enroll in their retirement plan, make changes to their contribution rate or account allocation, view their investment performance and request loans or hardship withdrawals right from their smartphone.

**Financial Wellness program**<sup>2</sup> – A robust financial wellness program can be accessed through the participant website and offers education tools and content on a variety of topics.

**ADP Achieve Education program** – Our Achieve education program makes it easy to drive learning and engagement with access to live support and a range of tech tools and communications, including our participant website. Through a simple dashboard view, employees can access important information at-a-glance. Participants can conduct transactions, make account changes, research plan investments and get prospectuses and access quarterly account statements.



1,063 associates  
dedicated to retirement services



\$80B assets  
under administration



2.2M  
plan participants

ADP Retirement Services, December, 2019

<sup>2</sup> The Financial Wellness program and its related materials are provided for educational purposes only, and are not intended to be, nor should they be deemed as, investment advice, financial planning, or tax assistance. Any projections and other output generated by any calculators or tools are hypothetical in nature, do not reflect actual investments or investment results and are not guarantees of future results. The calculators and tools simply apply user input and the assumptions selected to provide a rough assessment of the likelihood that hypothetical results may be achieved. Users should not rely on these materials or output as the primary basis for any investment, financial, or tax planning decisions. ADP cannot guarantee or assure a user's ability to meet any of his or her goals or that any hypothetical results actually will occur.

## At ADP, what we do is about people

For 70 years, ADP has been reshaping the way people work. We make benefits solutions — including retirement plans — that deliver long-term value. Whether you're a small business or a global enterprise, we'll help you focus on what's important. We can help you spend more time on the work you love by providing you with the most flexible, scalable solutions to help you get work done, from payroll and other HR solutions to benefits administration and retirement. We are here to support your business and your employees in whatever way we can. Stay well and be safe.



## We're here to help.

For more information about ADP retirement plan solutions and how they can meet the needs of your workforce, please contact us today at (800)432-401k or visit [www.adp.com](http://www.adp.com).

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