

# Workplace benefits that help your clients and their employees thrive



ADP can help you help your clients build a better retirement plan as they return to the workplace. Workplace benefits represent a commitment by employers to nurture their workforce and grow their talent community. When your clients and their employees are empowered to reach their full potential, they can be inspired to achieve their personal and professional best [Click to learn how ADP can help.](#)



## SIMPLIFY PLAN ADMINISTRATION AND COMPLIANCE

ADP Retirement Services takes pride in reducing and streamlining plan administration with sophisticated integration solutions, intuitive, secure website dashboards, with anywhere and everywhere access, and analytics that turn data into insight, and simplified compliance support.

### SMARTSync® Integration

Save time, simplify administration, and reduce the risk of costly errors by connecting your real-time ADP Payroll data to your retirement plan benefits.

### ADP Connect Service

Easily send payroll, demographic and compliance data with our payroll integration service designed to be used with any payroll provider.

### Plan Health Metrics

Better assess plan effectiveness, participant retirement readiness, and fiduciary performance with [detailed analytics](#) that measure participant retirement readiness, like retirement income replacement ratios, deferral gap, and projected monthly income data.

### Compliance Dashboard

We've made compliance less complicated by transforming a time-consuming task with technology, integration, and a streamlined process. A guided user experience and an easy-to-use system that puts your client in control simplifies compliance responsibilities. [Click to learn more.](#)



## Inspire financial empowerment with ADP Achieve

Our ADP Achieve program unleashes technology to simplify retirement planning and engage employees in a number of ways:

**ADP Mobile App** puts participants in control of their retirement account anywhere and everywhere by allowing them to easily text enroll in the plan, make changes and initiate transactions, receive targeted messages and more.

**MyADP Retirement Snapshot<sup>1</sup>** tool helps employees estimate their personal retirement savings target and the monthly savings amount to reach it.

**Personalized, curated messaging** and interactive micro-learning activities deliver a cohesive and unique financial planning experience for every user.

**Financial Engines<sup>2</sup>** - ADP clients may choose to offer investment advisory services through Financial Engines to support their participants' needs for investment advice and guidance.

**A financial wellness library<sup>3</sup>** of digital tools and educational information on a range of topics.

**ADP Marketplace<sup>4</sup>** By using ADP Marketplace apps, workers can leverage robust, well-known financial planning apps to improve their financial literacy, manage debt, protect their identity, plan for retirement, save for college, and more.



## Flexible investment platforms and services to help your client's plan succeed

With unmatched choice and flexibility, you can design a retirement benefit that meets the needs of your client's business and their employees. [Learn more.](#)

### Open fund architecture<sup>5</sup>

As an independent provider, you have the flexibility to realize your vision of a low-cost investment menu with:

- Flexible, objective, unbiased investment platforms
- No proprietary fund requirements
- Access to a wide range of funds offered by leading investment managers

### Third-party provider support

We can facilitate the outsourced services of certain Third-Party Administrators (TPA's) and 3(16) plan fiduciaries hired to provide fiduciary plan administrative oversight.

**3(21) and 3(38) Advisory Services<sup>6</sup>** - if selected, allows clients to receive assistance in making investment decisions for the plan that can help mitigate the risks associated with investment options selection and monitoring.



## Service and support

**Advisor Portal** - our cutting-edge advisor website provides you with the information you need to make timely decisions about your clients, plans and business.

**Advisor Elite Program** - Select lever advisor inquiries are aligned under a single all-advisor focused service team that provides product support.

**ADP Referral Program** - We offer a referral program specifically for advisors to benefit from their consulting services.

## BEYOND RETIREMENT

Solving complex Human Capital Management (HCM) challenges for employers is what we do. ADP can help you connect payroll, HR, and benefits administration and streamline your HCM.

1 **IMPORTANT:** ADP, Inc. owns and operates the ADP.com website and ADP mobile app. MyADP Retirement Snapshot makes no assumptions about your tax status or savings and should not be used as the basis for any planning decisions. The likelihood of various savings outcomes are hypothetical, do not reflect actual investment results or market fluctuations and are not guarantees of future results. Results may vary potential savings scenarios, with each use and over time. Information utilized to make projections includes the user's age, current annual compensation, account balance, deferral rate, and projected retirement age and state. Inputs can be changed to present different scenarios. MyADP Retirement Snapshot is provided for educational purposes only to understand the benefits offered by retirement plan participation.

2 Financial Engines(R) Professional Management is a service of Edelman Financial Engines, LLC. Plans that wish to offer this participant advisory service may engage Financial Engines to serve as an investment manager or advisor to plan participants. Participant advisory and management services provided by Financial Engines Professional Management is made available through ADP, LLC ("ADP"), however Financial Engines is not affiliated with ADP nor any of ADP's affiliates, parents, or subsidiaries. ADP provides technology services that facilitate a plan's connectivity to the services of Financial Engines and provides information about Financial Engines' services to you; however the provision of these services is in no way a recommendation or endorsement by ADP of Financial Engines, nor does it imply a certain level of skill or services offered by Financial Engines.

3 We make ADP Financial Wellness Library of content available to you through EverFi, Inc. ("EverFi") for informational purposes only. NEITHER WE NOR EVERFI PROVIDE LEGAL, CERTIFIED FINANCIAL, OR ANY PROFESSIONAL ADVICE NOR DOES THE ADP FINANCIAL WELLNESS LIBRARY OF CONTENT CONSTITUTE THE PRACTICE OF LAW, OR ANY OTHER PROFESSION. Any information provided to you by us or EverFi as a result of your participation in the ADP Financial Wellness Library of content is being provided to you solely for your educational and informational benefit and should not be considered legal or professional advice or a substitute for the foregoing. You agree that you bear all responsibility for your own decisions you may elect to make based on any information you learn in connection with ADP Financial Wellness Library of content.

4 ADP Marketplace offers a variety HR solutions from ADP and third parties, including financial wellness offerings, many with pre-built integration to ADP platforms. Inclusion of such third party applications, services and integrated solutions available on ADP Marketplace are not a recommendation or endorsement by ADP Retirement Services and such third parties are not affiliated with ADP Retirement Services, ADP Broker-Dealer, Inc., or ADP Strategic Plan Services, LLC

5 In assembling and presenting its investment platforms, ADP, Inc. is not undertaking to provide impartial investment advice or to give advice in a fiduciary capacity.

6 Fiduciary services are provided through Mesirow Financial Investment Management, Inc., an SEC-registered investment advisor. Mesirow Financial is not affiliated with ADP Inc. or its affiliates. Mesirow Financial refers to Mesirow Financial Holdings, Inc. and its divisions, subsidiaries and affiliates.



## We're here to help.

At ADP, our goal is to help businesses survive, grow and drive the economy forward by making work easier. Our retirement plans can help you elevate your client's workforce by removing distractions and improving financial security. Now is the time to reassess how we work, and recommit to helping workers improve their financial well-being — for today and tomorrow. **For more information contact your licensed ADP Retirement Services District Manager:**

