

SERVICE COMMITTED TO SUPPORTING YOUR NEEDS AND BUSINESS GOALS

Confidently grow your practice with our attentive, knowledgeable team at your side.



The dedicated ADP Advisor Elite Service team acts as an extension of you and your team, providing:

- Personalized support from people who understand your business
- Efficient issue resolution, and timely answers to your most important questions
- More time to focus on attracting and retaining retirement plans—and less time worrying about service issues

ADP service by the numbers¹



65%

of service requests resolved within one day in the last year



70 YEARS

combined ADP tenure for the Advisor Elite Service leadership team



28%

of our service team staff has 5 years or more at ADP



100%

increase since July of 2021 in service staff supporting advisors, showing our investment in your success



331

advisor teams welcomed into our dedicated service model over the last 24 months

What advisors like you are saying about the Advisor Elite Service team

“He is amazing to work with! Always responsive and not only answers questions, but provides the reasoning and the why so we can learn.”

– Financial professional with 121 ADP plans since 2014 totalling \$965M in assets

“... was extremely helpful and the epitome of what a customer service representative should be.”

– Financial professional with 1 ADP plan since 2024 totalling \$509M in assets

“I never have to worry about getting a quick response...professional, extremely knowledgeable and courteous. We value our relationship with ADP and we count ourselves lucky to have been assigned to her. We really do just love her.”

– Financial professional with 31 ADP plans since 2015 totalling \$222M in assets

What advisors like you are saying about the Advisor Elite Service team (Cont.)

“...prompt, honest, hardworking, and makes your company look good!”

– Financial professional with 21 ADP plans since 2022 totalling \$21M in assets

“... goes above and beyond when it comes to assisting us and our plan sponsor clients. Most other providers are not as responsive and accommodating. He goes out of his way to reach a quick and accurate solution to any issues that may arise and handles it with grace and a smile!”

– Financial professional with 27 ADP plans since 2018 totalling \$121M in assets

“... is friendly, knowledgeable, and efficient. She is everything you could hope for in a support partner.”

– Financial professional with 44 ADP plans since 2023 totalling \$12M in assets



More than a provider, ADP is your retirement ally

ADP connects advisors, employers and employees to data and technology that make retirement plans easy and engaging. Seamless access to data and insights keeps everyone in control of saving for retirement. And our extensive, real-world experience in HCM and data security means we make work easier so everyone can thrive. We offer:

- Seamless, automatic flow of data through our ADP payroll and recordkeeping platforms to make retirement plan administration easy and streamlined.
- A data-driven approach to employee education that uncomplicates retirement planning and empowers employees to make better decisions.
- Flexible plan design to best meet the needs of businesses and their workforce.
- Industry-recognized security to ensure that employee data is secure, compliance is managed and risk is mitigated.

WE ARE COMMITTED TO SUPPORTING THE NEEDS OF RETIREMENT PLAN ADVISORS.

ADP is focused on helping you take your business further than ever before. For more information about how we can better support you and your business clients, call our Advisor Help Desk at 844-237-3548 or contact your licensed ADP Retirement Services District Manager.

¹ Source: ADP, Inc. as of July 1, 2025.

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NOTE: Client testimonials are selective samples and do not imply an endorsement of any particular product or service. Results may vary based on the employer's particular situation and other factors.

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