

SAVE⁴RETIREMENT POOLED EMPLOYER PLAN



Service and support

Committed to service excellence

At ADP Retirement Services, we're passionate about making retirement plans easier than ever before. That mission drives everything we do — from our innovative retirement plan solutions to our advanced technology and our commitment to exceptional service. We've grown a customer-centric service culture and trained and empowered our teams to deliver. From smaller plan transitions to complex plan conversions, our implementation and service teams are obsessed with making the process as easy as possible, supporting your company's growth, and helping complicated plans run smoothly.

Starting strong is crucial for success

A solid foundation sets the tone for everything that follows. No matter the size of your business, our Implementation Specialists will advise and guide you every step of the way. From reviewing plan provisions to helping ensure that the plan meets the needs of your organization, our knowledgeable team will keep you informed of key milestones and timelines. And because your plan is only successful when fully embraced by your employees, we'll coordinate closely with our Participant Success Organization to make sure that your employees are fully informed about your new plan, its features, and the resources we offer to help them start their retirement savings journey and keep them engaged along the way.



Our seasoned PEP Client Service Team boasts over a decade of industry expertise and are committed to not only promptly resolving issues but offering solutions that simplify your workflow.





Meeting your unique plan needs through service excellence

With **SAVE4RETIREMENT** Pooled Employer Plan (PEP)¹, our skilled Service Team and seamless data connections simplify plan administration and drive efficiency. You will be supported by a specialized team of tenured associates who possess a deep understanding of 401(k) administration, compliance, and employee education strategies to help you stay ahead of plan responsibilities and inspire participants to build financial security.

Our dedicated team of experienced retirement plan professionals specialize in various aspects of the plan's daily operations, offering total support to ensure your plan runs smoothly.²

The ADP New Business Team supports businesses through difficult larger plan conversions to deliver the best possible implementation experience.

Implementation Project Manager manages the entire conversion process for the plan's transition to ADP.

PEP Client Service Team coordinates all the day-to-day administrative services of the plan.

Retirement Counselor conducts enrollment meetings and ongoing education workshops to keep your participants motivated and active in the plan.

ERISA and Compliance Teams provide support for mergers, acquisitions and spin-offs, and keep you informed about the 401(k) plan requirements.

Retirement plan benefits without burdens

ADP has extensive experience supporting businesses of all sizes and complexities. Our advanced technology and seamless integration saves time and helps mitigate risk — and our platforms are ready to effectively support the plan's compliance with rules and requirements. In addition, delivery of required participant plan notices is automatically included.

1 Pentegra Services, Inc. is the PEP Pooled Plan Provider responsible for PEP oversight, and they have engaged ADP to provide recordkeeping and administrative support to the PEP.

2 None of the support services provided is intended to be or should be construed as investment, legal, financial, or tax advice.



For more information about the benefits of the **SAVE4RETIREMENT Pooled Employer Plan**, please visit www.adp.com/retirement.

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