



RECORDKEEPING SERVICES

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are created equal.*



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Finding the right recordkeeper for your plan can be exhausting. The market is crowded, full of vendors trying to catch your eye. Some offer impressive packages that come at a cost, while others wave bargain banners in hopes that low prices are your thing. At TRG, we have positioned ourselves to provide the perfect balance of value, customization and reliability. We are motivated to deliver services that combine high-end technology, a wide range of user customization and high-touch client service, while at the same time remaining cost-competitive.

As retirement plan recordkeepers, we operate within a larger team and value collaboration with Plan Sponsors, investment advisors and Third-Party Administrators (TPAs). As part of this team, we are constantly striving to improve the retirement plan participant experience through our innovative and value-centric recordkeeping services.

Our Solutions

TRG offers innovative and flexible retirement solutions tailored to the needs of employers and their employees.

	Plan Sponsor	Participants	Advisor
Compliance Data Center	●		
360 Payroll Integration	●		
Bilingual Customer Support	●	●	
Bilingual Website	●	●	
Live Web-Chat	●	●	
Plan Intelligence Report	●		●
Online Loan & Distribution Processing	●	●	
Managed Account Solutions		●	●
Retirement Readiness Tools		●	
Online & Phone Enrollment Support		●	
Open Architecture			●
Advisor-Managed Model Portfolios			●
Advisor-Branded Website			●

TRG Resource Checklist

For Plan Sponsors

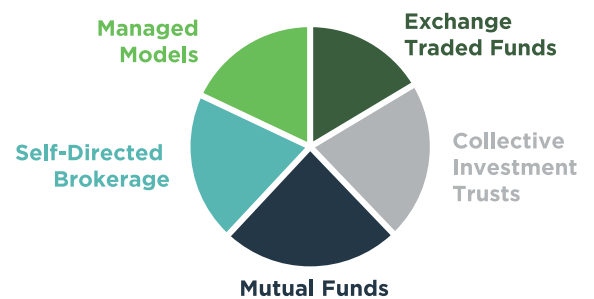
Implementation

Getting a partnership off the ground can be complex, unless your partner is absolutely invested in the success of the relationship. With all of our new client relationships, TRG provides a dedicated implementation team whose purpose is to coordinate the entire transition process. Along with this hands-on service, we offer an interactive implementation dashboard and weekly progress updates.

Independence

TRG is a truly independent partner. We offer a highly competitive, unrestricted “open architecture” approach to investments with access to thousands of mutual funds, exchange traded funds (ETFs), collective investment trusts (CITs) and model portfolios managed by top money managers.

Because we offer no proprietary investment products of our own, TRG is able to remain an independent and objective resource. Likewise, we don’t engage in any “pay-to-play” requirements with investment companies on our platform.



TRG Open Architecture

Fee Transparency

Our fees are clear and concise, making it easier for Plan Fiduciaries to better understand all plan costs and to fulfill their responsibilities to their participants. With no back-room revenue sharing deals with investment companies to hide, we openly display our fees for our Sponsors and participants to see.

Analytic Tools

Information is a critical resource for advisors, TPAs and the Plan Sponsors they serve. Through our proprietary Plan Intelligence Reports, users are presented with a wealth of information about their plans broken down by key demographics. Our interactive dashboard allows users to find important information quickly and easily.



Plan Sponsor Dashboard

For Employees

Financial Wellness

Our website provides access to tools and unbiased information to help participants with retirement planning, personal finance, college funding options, Social Security and more. Participants can access calculators, videos and informative content on various topics to help guide them through the planning process.

Simplified Enrollment Experience

The ideal time to positively influence participant behavior is at the point of enrollment when motivation is high. Our enrollment experience is easy and optimized to capture interest at its peak.



Participant Dashboard

The Power of Gamification

TRG's interactive experience engages participants and, with the push of a button, reflects future outcomes as they manipulate contribution and savings amounts.

True Flexibility

The retirement plan industry is evolving rapidly, which means that more and more is expected from plan sponsors and advisors. At TRG, we really do offer the best of all worlds: innovative technology and client-centric service that is consistently cost-competitive.



In the time it takes to drink a cup of coffee, participants can:

- Establish a successful saving strategy
- Establish an investment allocation based on the current fund lineup and participants' risk tolerance
- Detail in real time how that strategy impacts their current paycheck
- Illustrate an income stream in retirement that exceeds life expectancy



You can count on TRG to help you navigate the complexities of sponsoring a retirement plan. It's what we do.

