

Our **difference.**
Your **advantage.**



One of the **largest**
and most
experienced
Multiple Employer
Plan (MEP)
providers in the
nation

Client driven culture
We were **founded** by our clients, are
owned by our clients, and governed
by our clients
Client driven is in our DNA

100%
focused on
retirement plans

Over seven decades
of experience

No conflicts of interest
As a privately held company, we offer an
independent perspective and
objective point of view

Unparalleled governance
Our board of directors include
representatives of our clients,
Presidents and CEOs who use
our services and place the future
of their own retirement benefits
in our hands

In-House Experts
Certified Plan Consultants,
ERISA attorneys, Enrolled Actuaries and
credentialed professionals whose designations
include QKA, QPA, CEBS, SPHR, and ASA

More than 100 clients who have
been with us for **over 30 years**

Founded by the Federal Home Loan Bank System in
1943 Pentegra continues to manage FHLB retirement plans today along with the defined
benefit plan of the Office of the Comptroller (OCC)

Maximum flexibility for every
opportunity. You decide how to work
with us and we'll select the services,
fiduciary support and investment
platform that brings your solution
together **seamlessly**

A 98% client retention rate

True outsourced fiduciary administration. **Pentegra**
serves as ERISA-Named Fiduciary, Discretionary or
Directed Trustee, and 3(16) Administrator—delivering
a level of fiduciary protection that is unmatched

One of the largest and most experienced fiduciary administrators in the nation with over 1,000 outsourced plan adopters

CEFEX Certified by The Centre for Fiduciary Excellence, LLC Pentegra is part of an elite group of firms in the U.S. that has successfully completed the independent certification process for service providers and has demonstrated adherence to the best practices in the retirement industry

Strong presence in the financial services sector with more than 700 financial institution retirement plans

Best-in-class investment options with true, open architecture including nonproprietary institutional index and retail mutual funds, self-directed brokerage accounts, ETFs and other non-traditional investments, such as employer stock and CD funds

Pentegra's qualified retirement plan solutions have earned the endorsement of the American Bankers Association through its subsidiary, the Corporation for American Banking. Pentegra is the exclusive Preferred Partner for qualified retirement plans for NAFCU Services Corporation

97% client satisfaction rate; Top performer distinction when compared to peer group competitors*; Outperformed small/middle market DC benchmark* in nearly every category

* Anova's proprietary benchmark for the Pentegra survey consists of 10 leading retirement plan providers in the small / mid-market space.

More than \$9 billion in assets under management

Expansive services

including custom plan design, consulting, administration and recordkeeping, legal and technical support, plan compliance, fiduciary services, education and communications, advisor, sponsor and participant 24/7 web access and internal and external sales support, available on a bundled or unbundled basis, with any combination of fiduciary support or stand-alone TPA services

Contact us at 800.872.3473, visit us at www.pentegra.com or become part of the conversation and follow us on



Let us help you achieve your goals.

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Broad capabilities with all plan types, including complex designs. MEPs and Group Trusts, 401(k) plans, Traditional Defined Benefit Pension plans, Cash Balance plans, 412(e)(3) Fully Insured Defined Benefit plans, Split Funded Defined Benefit plans, DB/DC Combination plans, KSOPs, ESOPs, Profit Sharing plans, Age-Weighted plans, New Comparability plans, 457(b) and 457(f) plans, 403(b) plans and Non-qualified Executive Benefit and Director plans