

# PENTEGRA QUICK FACTS

At Pentegra, we are a different kind of retirement plan partner. That's because we're a fiduciary first. As one of America's oldest independent fiduciaries, we help employers offer better retirement plans.

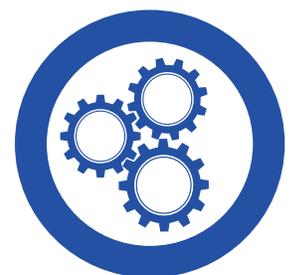
## Our History

- A 75+ year legacy serving as an institutional fiduciary
- Nearly \$15 billion in assets under administration/management
- Serving more than 4,000 complex retirement plans
- Supporting nearly 200,000 participants nationwide
- Among the largest U.S. Pension Plans\*
- A Centre for Fiduciary Excellence (CEFEX) Certified Administrator
- A level of fiduciary expertise and oversight unmatched in the industry today
- One of the largest and most experienced Multiple Employer Plan (MEP) providers in the nation
- An independent fiduciary organization; We have no conflicts of interest
- A board of directors comprised of our clients; We answer to those we serve



## Our Solutions

- A mission to create better retirement plans that run with less risk, greater efficiencies and improved outcomes



Our Solutions				
<b>Qualified Retirement Plan Solutions</b> <ul style="list-style-type: none"> <li>• Defined Benefit Plans</li> <li>• Defined Contribution Plans</li> </ul>	<b>Non-Qualified Retirement Plan Solutions</b> <ul style="list-style-type: none"> <li>• Defined Benefit Plans</li> <li>• Defined Contribution Plans</li> <li>• Benefits Financing Solutions using BOLI</li> </ul>	<b>Fiduciary Outsourcing Solutions</b> <ul style="list-style-type: none"> <li>• 3(16) Administrator</li> <li>• ERISA Named Plan Administrator</li> <li>• Trustee, Directed or Discretionary</li> </ul>	<b>Flexible Plan Designs</b> <ul style="list-style-type: none"> <li>• Single Employer Plans</li> <li>• Multiple Employer Plans</li> <li>• Association Retirement Plans</li> <li>• Pooled Employer Plans</li> <li>• Group of Plans</li> </ul>	<b>Institutional Investment Solutions</b>  <b>Consulting Solutions</b>

\*Top 200 Ranking in 2019 Pension & Investments (P&I) Survey of U.S. Retirement Sponsors

## How We Work With You

- We partner with firms at the advisor, plan sponsor and enterprise level to bring maximum flexibility to every opportunity. We can fill every role, or fill the gaps.



### Our Partnership Arrangements



## Our Team

- A fiduciary partner for your plan
- The bench strength of a tenured and professionally credentialed team
- In-House ERISA attorneys, Enrolled Actuaries, ASPPA-certified consultants, fiduciary and compliance experts
- Client facing team members average 15+ years of industry expertise
- More than 60% of our client-facing staff hold professional credentials and/or advanced degrees
- A team of 10 dedicated exclusively to investment research and analysis
- The peace of mind that a professional on board provides



Visit us at [www.pentegra.com](http://www.pentegra.com) or contact the Pentegra Solutions Center at [solutions@pentegra.com](mailto:solutions@pentegra.com) or 855-549-6689.

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