

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.

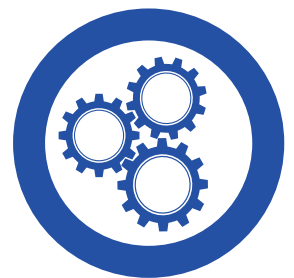
Our History

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

*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 or contact the Pentegra Solutions Center at solutions@pentegra.com or 855-549-6689.

Follow our conversation

