



Pentegra Introduces Fiduciary Scorecard™ to Measure Plan Success

White Plains, NY, May 13, 2021 Today Pentegra Services, Inc. (Pentegra), a leading provider of retirement plan and fiduciary outsourcing solutions to organizations nationwide, introduced a new, proprietary Fiduciary Scorecard™—a key tool for helping defined contribution plan sponsors measure plan success.

Unique in the industry, the scorecard provides clients with a way to document the fiduciary oversight process. It is designed to illustrate the value of fiduciary oversight and how it helps the sponsor ensure high standards of care. As an institutional fiduciary, Pentegra assumes responsibility and liability for key plan tasks. The scorecard details the list of fiduciary tasks being completed for defined contribution plans over the course of the plan year, helping to instill sponsor confidence that a plan is in good standing and meets all fiduciary requirements.

Said Pentegra President & CEO John Pinto, "Fiduciary services are becoming increasingly important to retirement plan sponsors, particularly in today's environment. With our new Fiduciary Scorecard™, we can offer our clients an even more comprehensive solution. As an institutional fiduciary, our goal is to help our clients minimize risk and ensure that their retirement plans are being managed properly."

The Fiduciary Scorecard™ showcases Pentegra's fiduciary expertise and provides clients with a much needed tool that also helps communicate with senior management and boards that they are taking the right steps when it comes to plan oversight, and ultimately, plan success.

Retirement plan administration is complex. Outsourcing fiduciary responsibility by engaging an independent fiduciary helps plan sponsors design a more effective plan that is compliant and easy to administer. Pentegra's fiduciary services provide plan sponsors with the security that comes from having an experienced professional on board.

About Pentegra

Pentegra is a leading provider of retirement plan and fiduciary outsourcing solutions to organizations nationwide. As one of America's oldest independent fiduciaries, we deliver retirement plans that run with less risk, greater efficiencies and improved outcomes. With a 75+ year legacy of fiduciary expertise and oversight unmatched in the industry today, we partner with firms at the advisor, sponsor or enterprise level to bring maximum flexibility to every opportunity, offering a comprehensive array of qualified and non-qualified retirement plans, TPA services and fiduciary support. Learn more at www.pentegra.com.

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