

## Overview of PCS Retirement

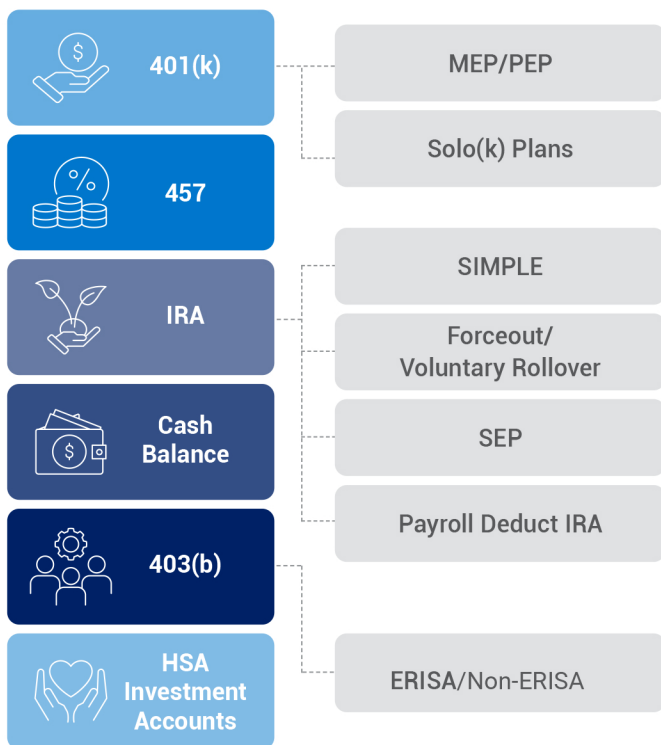
PCS Retirement (PCS) is among the nation's largest independent and conflict-free retirement solution providers, empowering organizations and financial institutions to build advisor-first retirement programs across a broad range of group and individual accounts for both ERISA and non-ERISA clients. PCS offers state-of-the-art technology and a completely open investment platform, featuring no proprietary funds.

### Core Recordkeeping Services

- Experienced sales, service and account transition teams
- Intuitive web and mobile experiences
- Participant call center that incorporates IVR and AT&T language-line services
- Financial wellness and retirement-readiness personalized tools and targeted employee communication campaigns
- Plan design, consulting and 3(16) services
- Payroll processing with 180/360 degree integration
- Fiduciary oversight support including preparation and delivery of required IRS and DOL notifications
- Sophisticated compliance and reporting services
- Daily valuation and maintenance of participant-level accounts
- Plan sponsor reporting, available online in multiple file formats
- Annual Plan Review and Benchmarking reports

### All Plan Sizes and Types

One partner for all plan types



### PCS At-A-Glance

**28,000**  
Total Plans

**\$31 B**  
Assets Under Administration

**500,000**  
Participants

#### We offer:

- Ongoing advisor support for prospecting and servicing clients
- Full investment flexibility with mutual funds and ETFs
- Ability to deliver custom investment models
- Advisor-centered branding
- Competitive client pricing with flat recordkeeping fees
- Modernized recordkeeping with retirement readiness tools such as iJoin, in-plan income solutions, and managed accounts

Ready to get started? [Contact us today](#) and we'll show you how easy it can be to grow your retirement plan business immediately.

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