

Your retirement program. Your way.

Building and growing your retirement plan business can be easy—all it takes is the right people to help you on your journey.

We set out to create an all-inclusive retirement program that's affordable, independent, and conflict-free. With innovative resources and tools, we make it easy for advisors to acquire, convert, and retain retirement plan business. Partner with us and **experience a hassle-free and cost-effective approach to your retirement plan business.**

We'll handle everything at the back-end so you can **focus on what matters most—your clients.**

Committed to excellent customer service, and providing an advanced and intuitive platform that's customized to your business and brand, our platform offers features such as:

- Investment flexibility and customized model portfolios without restrictions or limitations
- Annual Plan Review and Benchmarking tools
- Customizability to comply with your corporate branding
- Ability to bundle administration and recordkeeping services, or the option to use a third-party admin
- The ability to bundle TPA and RK services or the option to work with your local TPA
- Ability to create custom advisor fee schedules where we calculate and remit payment to you automatically
- Access to Advisor Lab—with tools to reveal insights on clients' behaviors



Tested & Certified for Excellence

CEFEX and Roland|Criss have certified PCS as adhering to the high Standards of Practice for Retirement Plan Providers, set by the American Society of Pension Professionals & Actuaries (ASPPA).

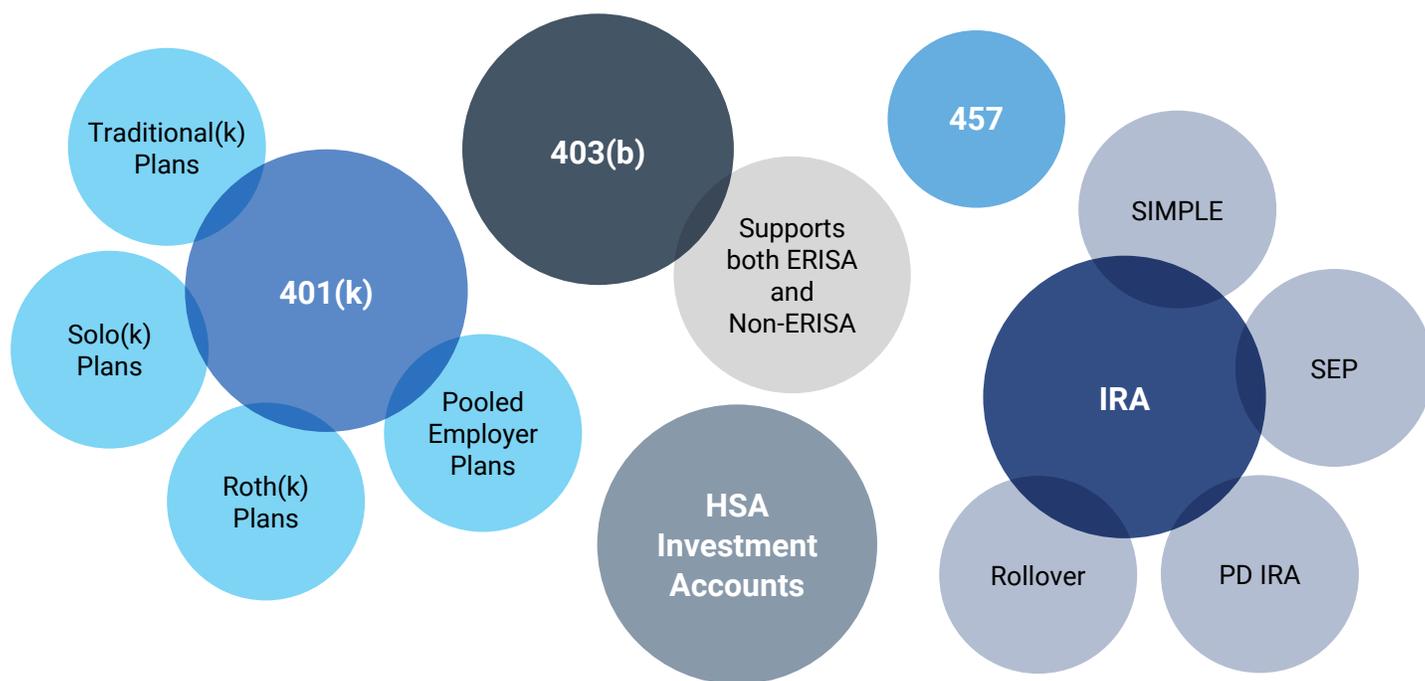


PCS was rated one of America's fastest growing companies by Inc. 5000

PCS provides a truly independent and conflict-free retirement plan platform, setting us apart from bundled solutions that often push certain funds and have hidden agendas. Some key differentiators of our platform:

-  Access to 21,600+ investment options to choose from, spanning a list of 160+ different fund families
-  Availability of ETFs
-  No proprietary fund or revenue sharing requirements
-  No investment of share class restrictions
-  Dollar-for-dollar offset of all mutual fund revenue
-  Availability of integrated self-directed brokerage

One partner for all plan types



Advisors choose PCS for our comprehensive participant support applications and reports, offering **many tools to attract and maintain retirement plan business**, including:



Retirement Savings Snapshot

Our Retirement Savings Snapshot is an easy-to-read report that takes a participant's current monthly contribution amount and projects potential retirement savings based on incremental increases in monthly contributions.



Participant Engagement

The Participant Engagement program sends monthly emails with tailored topics segmented by age, driving website engagement and promoting retirement plan participation for increased retention and business growth.



Evergreen Enrollment Materials

Our "Evergreen" Enrollment Guide is an extensive, "how-to" reference for plan enrollment, the benefits of participating, detailed information on available investment options, and ERISA-required participant notifications.



iJoin EXPLORE

iJoin EXPLORE is an interactive learning experience that guides participants toward long-term financial security. Through engaging activities on topics like retirement planning, emergency funds, and income protection, individuals learn and gain actionable insights—automatically updating their personalized goals-based plan.

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

 1-877-272-4015

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[Meet Our Team](#)