

# A Next Generation 401(k)

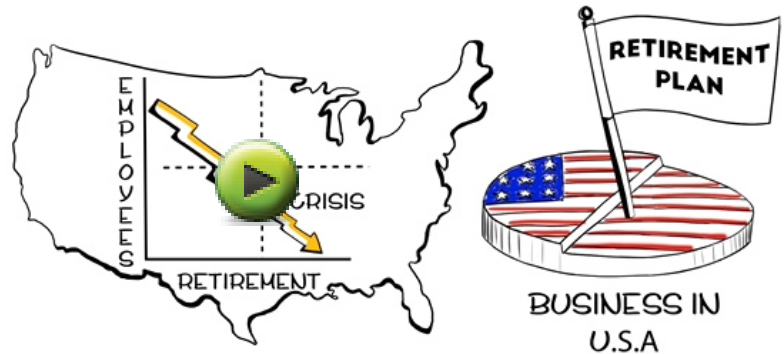
## The Pension & Retirement Group Retirement Solution

With the Pension & Retirement Group's goal of leadership in the financial industry, built upon a model of service, we declare these values as the drivers for that success: service, diversity, transparency, accountability, listening, and consistency. Our service to our clients is oriented toward helping them making informed decisions.

The Pension & Retirement Group has teamed with TAG Resources, LLC, and retirement heavyweights, Transamerica and Envestnet Retirement Solutions to power The

**Pension & Retirement Group Retirement Solution**, an improved 401(k) with advanced technology for today's retirement needs – helping you make the most of your own 401(k).

Click for video or go to [tagresources.com/tag-animated-video](http://tagresources.com/tag-animated-video)



### Key Benefits of The Pension & Retirement Group Retirement Solution

**Pay Reasonable Costs:** Because The Pension & Retirement Group Retirement Solution is built on an “aggregated” model – your company gains the advantages of economies of scale in pricing.

**Ease of Administration:** TAG Resources performs 99% of the administrative duties required for a company to offer a 401(k) to its employees. This removes the administrative burden from company employees and executives so you can focus on what's most important — running your business.

**Well known and Substantial Providers:** TAG is the largest “end to end” aggregate provider of 401(k) services in America. TAG partners with Transamerica as Recordkeeper, with \$245 billion in assets serviced as of Dec. 2016, and with Envestnet Retirement Solutions as the Investment Manager, with over \$30 billion in assets under advisement as of September 30, 2017, which includes assets in 3(21) and 3(38) plans.

**Fiduciary Liability Protection:** This retirement plan allows a company to shift its fiduciary duties to the greatest extent permitted by law providing a company fiduciary support to mitigate defined legal obligations and responsibilities. This commitment by TAG Resources, provides confidence that your fiduciary obligations are being met. Regardless of the service provider's responsibilities as plan fiduciary, the employer still remains a fiduciary with all defined legal obligations and responsibilities.

**Consistent Compliance:** Historically, more than 67% of all 401(k) plans failed its Department of Labor random audit. \* However, plans administered as directed by TAG Resources have never failed an audit. TAG is your 401(k) Support Team, signs the Form 5500, and ensures each plan is consistently in compliance with the DOL and IRS regulations. If you are out of compliance, TAG is out of compliance – and that has not happened in TAG's 15+ years of operation.

\* United States Department of Labor statistics from review period of 2015

Click to learn more about  
the Retirement Solution

[PRG.tagresources.com](http://PRG.tagresources.com)

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