

TPA Loyalty Program



Your partnership is important to us. As our relationship grows, we'd like to offer exclusive benefits to you and your practice.

TPA LOYALTY PROGRAM	GOLD	PLATINUM
	<ul style="list-style-type: none"> • 15 plans and \$30MM in assets • 5 new sales per year 	<ul style="list-style-type: none"> • 25 plans and \$50MM in assets • 10 new sales per year
<p>Service team A TPA service team with a designated lead for your plans. A day-to-day contact for streamlined communication on your book.*</p>	✓	✓
<p>Annual business development support The Standard will partner with your firm to expand your practice reach through targeted business development activity.</p>	\$2,000	\$5,000
<p>Annual community charity sponsorship The Standard will co-sponsor an event to support your local community charities and organizations.</p>	\$1,000	\$2,500
<p>Development and execution of a joint business development plan</p>	✓	✓
<p>Optional delegated ERISA 3(16) fiduciary in conjunction with The Standard Your firm will be part of an elite group of TPA firms that can partner with The Standard using our 3(16) services.**</p>	✓	✓
<p>Referrals from The Standard*** On sales opportunities, where a specific TPA is not requested, The Standard will refer those to the Elite TPA pool only – based on geography of the plan sponsor, the advisor, and the unique needs of the opportunity.</p>	✓	✓
<p>TPA Staff Industry Designation Scholarship Designations matter! The Standard will cover registration and study materials for up to five staff members to receive an industry credential.</p>	✓	✓
<p>Speaking Engagements with The Standard's Elite National Advisor Partners Invitation to join The Standard and co-present with us at Elite National Advisor Partners webinars or join us at live-in-person events.</p>	✓	✓

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<p>TPA Annual Awards Conference Celebrate our shared success! 5 TPAs and their significant others will be invited to attend annual TPA awards trip. Location and timing determined annually by The Standard TPA Governing Board.</p>		✓
<p>Major national industry event registration**** Network with industry centers of influence. Your firm will receive one (1) scholarship to attend one of these national events: NIPA BMC, NAFE, ASPPA, NAPA 401(k) Summit, Fi360 or Wealth@wor(k) (formerly Advisor 2X Excel).</p>		✓

* We'll make every effort to assign a lead account manager for TPA plans with elite status. Exceptions may be made due to volume of plans, sales activity or other circumstances. To ensure the best possible experience for you and our joint clients, we document your service preferences. If your lead service team member is unavailable for any reason, a member of the team will meet your needs as expected. Your service team's sole focus is TPA work only, meaning team members understand the unique nature of the unbundled service model.

** Additional fees may apply to optional 3(16) services.

*** All 401(k) plans <\$2MM will be unbundled only. When the advisor does not request a specific TPA for the quoted plan, elite TPAs will be referred based on geography of the plan sponsor, the advisor and the unique needs of the opportunity. The Standard does not endorse any particular TPA firm.

**** Choose from five large annual conferences: NIPA/NAFE, ASPPA, NAPA 401(k) Summit, Fi360 or Wealth@wor(k) (formerly Advisor 2X Excel).



The Standard | standard.com | 1100 SW Sixth Avenue, Portland, OR 97204

The Standard is the marketing name for StanCorp Financial Group, Inc., and its subsidiaries. Standard Retirement Services, Inc. provides financial recordkeeping and plan administrative services. Standard Insurance Company and Standard Retirement Services, Inc. are subsidiaries of StanCorp Financial Group, Inc., and all are Oregon corporations.