



The Standard's TPA Partner Payment Program

For plans effective in 2023

We value our TPA partnerships and are pleased to offer you this program.

401(k) & 403(b) PLANS UP TO \$2MM



On transfer of assets:
\$1,000 payment



Paid starting immediately:
5 basis points trail payment

ALL PLAN TYPES \$2MM TO \$10MM**



On transfer of assets:
20 basis points



Paid starting immediately:
5 basis points trail payment

ANNUAL SALES VOLUME BONUS*

Minimum plans sold: 10

+

Transferred assets: \$10-\$19,999MM

=

2 basis points on all transferred assets during the calendar year

Minimum plans sold: 20

+

Transferred assets: \$20MM+

=

4 basis points on all transferred assets during the calendar year



WANT TO LEARN MORE?

Contact us at TPAServices@standard.com or 844.239.3561.

* Any plan type/size will be included in qualification for the annual bonus payment.

** All other plan types of any size will also be paid on this schedule, e.g., 457, defined benefit, cash balance, etc.