BNY MELLON | PERSHING

Retirement Plan Manager

Retirement Plan Manager* is a new payroll contribution processing solution that gives small business owners an easy way to fund their employees' SIMPLE IRA plans.

Designed to help firms increase their productivity by simplifying the process for managing frequent employer and employee contributions to Pershing brokerage accounts, Retirement Plan Manager provides advisors automated trade functionality with access to hundreds of fund families.

BENEFITS FOR EMPLOYERS

Retirement Plan Manager makes it easier for employers to oversee the payroll contribution process for their employees' SIMPLE IRA accounts. It's designed to be intuitive, while also being robust and enriched with features. Employers log in through RetirementPlanManager.com.

In addition, Retirement Plan Manager allows employers to:

- Easily initiate and allocate employer and employee retirement plan contributions.
- Utilize multiple options to enter contribution information.
- Quickly review contribution history.
- Access self-service options to correct payroll errors in real time.
- Delegate payroll funding to appropriate personnel.

BENEFITS FOR FIRMS AND ADVISORS

Retirement Plan Manager can help firms and financial professionals save time and increase productivity by reducing manual processing as well as providing additional benefits including:

- Replacing the paper check splitting process with an all-digital solution.
- Providing access to more than 28,000 mutual funds from more than 800 fund families, including over 7,500 mutual funds from 300 fund families with no transaction fees, via FundVest®.
- Allowing firms to set controls on the menu of available mutual funds.
- Automating mutual fund trade processes for ongoing contributions.
- Offering a holistic view of your firm's retirement plan business with Pershing via NetX360®.
- Providing single-sign on to the Retirement Plan Manager portal via NetX360 allows firms and advisors to view the employer experience.
- Offering robust reporting options for review and compliance purposes.

WHAT MAKES RETIREMENT PLAN MANAGER DIFFERENT?

Retirement Plan Manager meets the unique needs of small business owners, enabling them to more easily handle the complexities that come with payroll and contribution processing while improving the data quality and operational efficiencies, thereby reducing cost and effort.

For more information about Retirement Plan Manager, please contact your Account Manager, Relationship Manager or Product Consultant.

* Retirement plan linking through NetX360's Relationship Profile Manager is a prerequisite.

pershing.com

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