



T.RowePrice

# T. Rowe Price Retirement Plan Services

## Our ongoing commitment to Third-Party Administrators (TPA)

- Strong growth and focus with TPAs—90% of plans sold involved a TPA<sup>1</sup>
- Strategic leadership with Lynn Roy, Head of TPA Markets
- A dedicated team of TPA sales consultants to support and lead TPA sales growth

**At T. Rowe Price, we see “TPAs” as Trusted Plan Advocates.**

Our business model doesn’t just support, but emphasizes the role you play.



### Technology

- 70% of our budget is focused on intermediary development (advisors and TPAs)<sup>2</sup>
- We prioritize enhancements based on your needs to service clients effectively



### Flexibility

- We offer a range of solutions for start-up plans up to \$50 million in our core market space
- Won over \$1.2 billion in additional new sales utilizing creative solutions—including using our aggregate plan solution model—all involving TPAs<sup>1</sup>



### Enhanced TPA Pricing

- Institutional pricing (I-class shares) for TPA plans of all sizes
- We offer a one-time \$1,500 new business credit for qualifying plans that use a TPA
- Our fixed pricing provides a greater level of transparency for sponsors and advisors on the costs of a plan over time
- Our enhanced aggregate solutions highlight and promote the value a 3(16) provides to advisors and sponsors

## Discover the value we bring to retirement plans.

Contact us today at **1-800-831-1370** to learn more.

<sup>1</sup>T. Rowe Price Core Market Sales Report, September 2023. Excludes Focus Choice Select.

<sup>2</sup>As of final product budget for 2023.

T. Rowe Price Retirement Plan Services, Inc.