

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 TPA¹
- 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)²
- 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 TPAs¹



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.

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

²As of final product budget for 2023.

T. Rowe Price Retirement Plan Services, Inc.