



## Lock In Sizeable Savings

**First-year fee waivers can help you boost your business.**

The end of the year is quickly approaching, and that means prospective clients are making key decisions about their retirement plans. It's the perfect time to engage them with an offer to save significantly on first-year plan fees with Ascensus.

From **August 1 until December 31, 2023**, when you sell Ascensus plans with 100+ participants with a balance, you can lock in a great deal for your clients.

**100% waiver**  
of the first-year base and participant  
fees with a five-year contract<sup>1</sup>

**50% waiver**  
of the first-year base and participant  
fees with a three-year contract<sup>1</sup>

Clients with 350+ participants will enjoy the benefits of our enhanced large-plan client service model, including an in-field client relationship manager, a day-to-day retirement service consultant, and a participant education consultant.

These temporary waivers apply to Ascensus full-service and recordkeeping only plans, including both new and transfer plans. For qualified prospects with pending proposals issued before August 1, these temporary waivers also apply. They're easy for clients to understand, create even more value for them, and can help you grow and retain business.

## Why choose Ascensus?

After combining the strengths of Ascensus and Newport, our unified organization is your one-stop destination for enhanced products and solutions to meet any client's needs. You now have even more flexibility and freedom to structure plans that make sense for your clients.

### Ascensus is a partner you can trust—for clients large and small.



2022 Retirement Leader of the Year<sup>2</sup>



52 "Best in Class" awards for retirement plans up to \$200 million, with the most won among all retirement plan providers for plans up to \$50 million<sup>3</sup>



2023 PLANADVISER Adviser Choice Awards, winner in the recordkeeping category<sup>4</sup>



Top 10 defined contribution (DC) recordkeeper by total DC assets under administration<sup>5</sup>

### World-class service is at the heart of everything we do.



+83 NPS for overall client satisfaction and +79 for onboarding experience<sup>6</sup>



97% client retention rate<sup>7</sup>



Top 10 in JD Power Retirement Plan Digital Experience for customer satisfaction<sup>8</sup>



Top 5 provider in DC plans serviced<sup>9</sup>



9+ years average plan length on the platform<sup>10</sup>

## Wherever your clients want to be, they can get there with Ascensus.

**Contact us at 800-345-6363 to tap into our expertise—and use our limited-time first-year fee waivers to close more opportunities.**

<sup>1</sup>Standard transaction expenses apply. We will apply the concession when the SmartStart digital onboarding process is completed in good order by December 31, 2023.

<sup>2</sup>With Intelligence. With Intelligence Mutual Fund & ETF Awards. June 2022.

<sup>3</sup>PLANSponsor. 2022 Defined Contribution (DC) Survey. March 2023.

<sup>4</sup>PLANADVISER. 2023 Retirement Plan Adviser Survey. March 2023.

<sup>5</sup>Cerulli Associates. The Cerulli Report: U.S. Retirement Markets 2021. March 2022.

<sup>6</sup>As of March 31, 2023.

<sup>7</sup>As of December 31, 2022. Excludes plan terminations and mergers and acquisitions.

<sup>8</sup>JD POWER 2022 U.S. Retirement Plan Digital Experience Study. June 2022.

<sup>9</sup>Based on The Cerulli Report: U.S. Retirement Markets 2021 and aggregating the Ascensus and Newport books to reflect we're a unified entity.

<sup>10</sup>Ascensus-only platform data as of June 30, 2023.

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