

The Value You Deserve From a Partner You Can Trust



At Ascensus, we aspire to make a difference for others, helping them save for a better future.

We tailor solutions to meet the unique needs of all of our clients and savers. We bring value to these plans by making things easier through intuitive technology, friendly service, and dependable expertise—all at an affordable cost. That's why millions of people trust us with their savings plans.



Largest

independent retirement and government savings facilitator in the U.S.



\$863+ billion

in assets under administration (AUA)*

- \$256+ billion—Retirement
- \$235+ billion—Newport
- \$256+ billion—Government Savings
- \$119+ billion—FuturePlan by Ascensus



260,300+

retirement plans*



8+ million

529 education savings accounts*



45+

years of experience



5,400+

highly trained associates*

A Respected Leader



Retirement Leader

2024 Retirement Leader of the Year in the With Intelligence Mutual Fund & ETF Awards



NQR

Ascensus Client Service Processing Teams received a National Quality Review 5-star rating for service quality in the last 36 quarters



Best-in-Class Service

Received 39 PLANSPONSOR "Best in Class" Awards, for retirement plans up to \$200 million. Most won among all retirement plan providers for plans up to \$50 million



Advisers' Choice

2024 PLANADVISER Adviser Choice Award for recordkeeping services



529 Plan Recordkeeper

#1 in assets under management as ranked by ISS Market Intelligence



Top 10

in JD Power Retirement Plan Digital Experience for customer satisfaction

*As of 12/31/2024

Ascensus provides administrative and recordkeeping services and is not a broker-dealer or an investment advisor. Ascensus® and the Ascensus logo are registered trademarks of Ascensus, LLC. Copyright ©2025 Ascensus, LLC. All rights reserved. 801250-CORP-808000-PIN