



Selling Your Value

Recordkeeping Services Designed to Support TPAs

The Standard offers you an innovative and flexible TPA service model, so you can focus on the most important elements of your value proposition.

You Choose Who Takes the Lead

We offer you choice. The Standard can either deliver the following administrative duties or provide support if you prefer to keep the lead:

- Assistance with gathering data for new clients
- Notification of eligibility for the plan
- Interaction with participants and employer to facilitate distribution and loan processing
- Review and approval of loans, distributions, hardship withdrawals and QDROs
- Distribution of small account balances to terminated participants
- Facilitation of required minimum distributions
- Distribution of certain participant notices

A Unique Approach to Collecting and Leveraging Data

Our proprietary Participant Data Management technology employs a fundamentally different approach that ensures quality data. With each payroll, we collect data on all employees, not just those currently participating in the plan. The Standard applies *nearly 100 validations* on the data to ensure accuracy.

This unique approach helps track employee eligibility and enables real-time vesting calculations, which support the management of distributions and loans. Many TPAs find that having clean and comprehensive data saves significant time during compliance testing and census data collection.

Committed to You and Your Clients

At The Standard, client service and quality come first. When your clients transition to our platform, a plan implementation manager will work closely with you to ensure a smooth and timely experience. To help meet your ongoing needs, a dedicated TPA service team also is available to provide support and strategic insights.



The Standard's TPA services offer flexibility and complement your business model. Contact us at 844.239.3561 or TPAServices@standard.com to learn more.

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The Standard is the marketing name for StanCorp Financial Group, Inc., and its subsidiaries. StanCorp Equities, Inc., member FINRA, wholesales a group annuity contract issued by Standard Insurance Company and a mutual fund trust platform for retirement plans. Standard Retirement Services, Inc., provides financial recordkeeping and plan administrative services. Investment advisory services are provided by StanCorp Investment Advisers, Inc., a registered investment advisor. StanCorp Equities, Inc., Standard Insurance Company, Standard Retirement Services, Inc., and StanCorp Investment Advisers, Inc., are subsidiaries of StanCorp Financial Group, Inc., and all are Oregon corporations.

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