TPA Loyalty Program 2024

Our TPA Loyalty Program focuses on connecting and growing with you and your firm. This program offers exclusive benefits to TPA firms that hit annual sales targets and maintain specific plan counts and assets with The Standard.

TPA LOYALTY PROGRAM	GOLD	PLATINUM
	Book of Business: 15 plans, $30M in assets and new plan sales: 5	Book of Business: 30 plans, $60M in assets and new plan sales: 10
Service team A TPA service team with a designated lead for your plans. A day-to-day contact for streamlined communication on your book. *	✓	✓
Optional delegated ERISA 3(16) fiduciary in conjunction with The Standard Your firm will be part of an elite group of TPA firms that can partner with The Standard using our 3(16) services. **	✓	✓
Referrals from The Standard* On sales opportunities, where a specific TPA is not requested, The Standard will refer those to the Elite TPA pool only – based on geography of the plan sponsor, the advisor, and the unique needs of the opportunity.	✓	✓
Speaking Engagements with The Standard's Elite National Advisor Partners Invitation to join The Standard and co-present with us at live or online Elite National Advisor Partner events		✓
Annual community event sponsorship The Standard will join you and co-sponsor an event to support your local community charities and organizations.	$1,000	$2,000
TPA Staff Industry Designation Scholarship Designations matter! The Standard will contribute scholarship $ towards registration and study materials for TPA Staff members to receive or maintain industry credentials.	$500	$1,000
Major national industry event registrations Network with industry centers of influence. Depending on level, your firm will receive scholarship $$ to help with event registration fees to these national events: NIPA BMC, NIPA NAFE, ASPPA Annual, or NAPA 401(k) Summit.	$500	$1,000

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*We'll make every effort to assign a lead account manager for TPA plans with elite status. Exceptions may be made due to volume of plans, sales activity or other circumstances. To ensure the best possible experience for you and our join clients, we document your service preferences. If your lead service team member is unavailable for any reason, a member of the team will meet your needs as expected. Your service team's sole focus is on TPA work only, meaning team members understand the unique nature of the unbundled service model.

**Additional fees may apply to optional 3(16) services.

***All 401(k) plans <$2MM will be unbundled only. When the advisor does not request a specific TPA for the quoted plan, elite TPAs will be referred based on geography of the plan sponsor, the advisor and the unique needs of the opportunity. The Standard does not endorse any particular TPA firm.

For more information, please contact TPAServices@standard.com

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