

## MEDIA KIT: HISTORY & TIMELINE



For 50 years, BCG has been instrumental in shaping the future of the retirement plan industry. We're proud of our accomplishments and pleased to celebrate our rich and distinctive history with you. Our longevity and success would not be possible without the extraordinary efforts demonstrated by our dedicated employees and the support of our valued clients and partners.

As we look ahead, we will continue to strive every day to exceed your expectations, advance our offerings and create new solutions to transform vision into reality.

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1958 • BCG is founded

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1967 • Robert Paglione joins BCG  
• Develops retirement plan administration software

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1968 • Robert Paglione serves on ASPA Board of Directors

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1969 • First Defined Benefit Plan approved in NJ for Professional Corporation 1972  
• BCG creates First ESOP in PA

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1979 • BCG Executive sits on President Carter's Commission for Pension Policy

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1982 • BCG submits its first 401(k) to IRS  
• BCG participates in electronic government filings

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1987 • BCG quadruples space

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1996 • BCG introduces "Plan in a Box"

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1998 • SAS-70 Certified  
• BCG becomes nationwide service provider  
• BCG University established

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2001 • BCG expands sales offices throughout the USA

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2002 • BCG creates real-time workflow technology

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2004 • BCG receives the Dalbar Communications Seal of Excellence

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2005 • BCG Bank established  
• Ranked #5 in Top Benefits Consulting Firms

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2006 • BCG creates an electronic IRA Rollover solution

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2007 • BCG develops ISO Quality Assurance Programs  
• Executive joins Board of Directors - Council of Independent 401(k) Recordkeepers

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2008 • Celebrates our 50th Anniversary  
• Receives ISO 9001 Registration  
• Lumpsumdistribution.com is established  
• BCG introduces ETF platform

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2009 and Beyond

• BCG looks forward to new milestones, exceeding your needs and delivering service excellence. A bright future awaits!

### MEDIA CONTACT:

Deborah White, Marketing Manager

Phone: 856-368-7217

Fax: 856-824-1890

Email: [dwhite@bcgbenefits.com](mailto:dwhite@bcgbenefits.com)

### WEB ADDRESS:

[www.bcgbenefits.com](http://www.bcgbenefits.com)