



600 Delran Parkway, Suite B
Delran, NJ 08075
Phone: (800) 524-401K
Fax: (856) 824-1890
www.bcgbenefits.com

MEDIA KIT: THE BCG REPUTATION



Our reputation is based upon our customer service. The professionals at BCG are constantly searching for new ways to improve speed and accuracy, while keeping costs reasonable. It is our goal to provide our clients with a quality product and quality service.

To assist in this goal, BCG uses the most advanced technology available today and is an industry leader in this capacity.

BCG MISSION STATEMENT:

Our Mission is to help our clients build financial security through quality products and outstanding service, delivered at an excellent value.

Our Promise is to:

- Perform Every Facet of our Business with Integrity and Respect
- Conduct our Business in an Environment that Encourages Teamwork, without Minimizing the Contribution of the Individual
- Value Candor and Accountability
- Embrace Change and an Entrepreneurial Spirit

BCG QUALITY STATEMENT:

We are committed to:

- Focusing on customer satisfaction
- Understanding our clients' needs
- Complying with applicable legal requirements
- And continually improving the development, delivery, and support systems of our products and services.

BCG PEOPLE:

Benefit Consultants Group is comprised of a diverse group of professionals with a wide range of experience and background in the employee benefits and financial planning fields. Our employees share a common goal of providing excellent service for our clients by maintaining the most advanced benefits tools available today.

Our staff currently includes a number of:

- Attorneys
- Actuaries
- Accountants
- Qualified pension administrators
- Qualified 401(k) administrators
- Registered investment advisors
- Licensed securities advisors
- Licensed financial advisors

MEDIA CONTACT:

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MEDIA KIT: WHO IS BENEFIT CONSULTANTS GROUP?



WHO WE ARE:

Benefit Consultants Group is an award-winning third-party administration firm. BCG provides plan sponsors and participants with innovative solutions, comprehensive sales support and high quality recordkeeping services to meet the specific retirement needs of its clients for over 50 years. Throughout the decades, BCG has met the challenges of an ever-changing retirement plan environment, while providing its clients with the highest degree of quality service, inspired plan design and implementation. BCG is also the first retirement services TPA firm in the country to receive an ISO 9001 Registration for quality management.

TOTAL ASSETS UNDER MANAGEMENT:

Over \$2 Billion

TOTAL NUMBER OF PLANS:

Over 2,000 plans

TOTAL NUMBER OF PARTICIPANTS:

Over 190,000

SPECIALIZES:

Specializes in servicing the small and medium-sized retirement plan segment (1 - 10,000 employees)

CLIENTELE:

BCG clients are represented in every state in the country.

MANAGEMENT:

Robert Paglione, CEO
Jorge Arroyo, President & COO
Adam Paglione, President BCGS
Beau Adams, Executive Vice President Business Development
Steve Sokolic, Executive Vice President General Counsel

LOCATION:

Benefit Consultants Group is headquartered in Delran, NJ.

WEBSITE:

www.bcgbenefits.com

MEDIA CONTACT:

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MEDIA KIT: PRODUCTS & SERVICES



PRODUCTS:

- 401(k)
- Roth 401(k)
- Safe Harbor 401(k)
- 457
- 403(b)
- Profit Sharing Plans
- New Comparability / Aged Based
- Defined Benefit
- Cash Balance
- ESOP
- Money Purchase Pension
- Non-Qualified Deferred Compensation
- Permitted Disparity

PLAN DOCUMENT SUPPORT:

- Prototype plan documents
- Volume submitter plan documents
- 403(b) plan documents
- Nonqualified plan documents (deferred comp, 457)
- Adoption agreements
- Summary Plan Descriptions (SPD)
- IRS filing
- Plan amendment services
- Plan restatement services
- Document review
- Document mapping services
- Consulting on default provisions/ common elections

RECORDKEEPING SYSTEM:

- 24/7 Web and toll free account access
- Multiple fund families
- Self directed brokerage accounts
- Asset allocation models
- Multiple contribution sources
- Automated tracking of eligibility
- Multiple vesting schedules between sources
- Daily valuation of participant accounts
- Quarterly participant account statements
- Quarterly administrator's report
- On-demand ad hoc advisor and plan sponsor reporting options

ONGOING ADMINISTRATIVE SERVICES:

- Dedicated single point-of-contact for advisors and plan sponsor
- Client and participant services Available Representatives (M - F 8 a.m. - 8 p.m. EST)
- Foreign language support (representative assistance)
- QNEC calculations
- QMAC calculations
- Signature Ready 5500
- Year end compliance testing
- Participant loan administration
- Participant distributions
- Tax withholding and reporting
- Comprehensive administrative guide
- Trustee services available
- Customer service guarantee

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MEDIA KIT: CERTIFICATIONS & AWARDS



CERTIFICATIONS & AWARDS:

BCG devotes a large portion of its operational budget to better serve its clients. BCG has achieved many successes:

- SAS-70 certification
- ISO 9001 Quality Management System Registration
- Dalbar Communications Seal of Excellence
- Philadelphia Business Journal - Top Benefits Consulting Firm
- Philadelphia Business Journal - Fastest Growing Firm
- South Jersey Magazine - Top 100

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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.

1958 • BCG is founded

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

1968 • Robert Paglione serves on ASPA Board of Directors

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

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

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

1987 • BCG quadruples space

1996 • BCG introduces "Plan in a Box"

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

2001 • BCG expands sales offices throughout the USA

2002 • BCG creates real-time workflow technology

2004 • BCG receives the Dalbar Communications Seal of Excellence

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

2006 • BCG creates an electronic IRA Rollover solution

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

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

2009 and Beyond

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

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MEDIA KIT:

WHY CHOOSE BENEFIT CONSULTANTS GROUP



WHY CHOOSE BENEFIT CONSULTANTS GROUP:

Benefit Consultants Group (BCG) knows that the right retirement plan is critical for both business owners and financial advisors and that choosing it challenges even the most talented business professional.

Since 1958, we have been helping organizations design, implement, and administer innovative plans. No matter how complex your needs, you will find technical expertise in recordkeeping and plan administration that has become the industry standard.

EXPERT ADVICE:

A team of industry professionals supports our retirement plans.

- In-house consultants, ERISA attorneys, accountants and actuaries will work with you and your advisors to insure your retirement plan meets your specific needs and objectives.
- A staff of industry-leading professionals who have an impressive average tenure of 9.7 years will address your questions and concerns.

INNOVATIVE OPTIONS:

Our service offering allows you to add additional features as your business needs change.

- Our active involvement with the government's changing legislation aligns your plan with current requirements.
- Our exclusive Retirement Plan Design process allows us to balance for your business' needs.

PERSONALIZED SERVICE:

Our commitment to clients individualizes each relationship.

- Our accuracy, timeliness and commitment to you is backed by a written, five-part, money-back guarantee.
- In addition to your participants receiving award winning statements and 24/7 account access to their plan information, you will also have access to a dedicated Account Manager who will handle any time-sensitive needs.

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