



*"20 Years of Excellence"*

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

# Your **e**ffective **r**eliable **p**artner

## **E**ffective | We Build Plans Aligned to Your Goals

- Whether you need to meet a state mandate, attract and retain employees, or target key employees with contributions, our team can help
- Firmwide expertise allows us to tailor your plan to your business goals
- Our professional team provides the highest level of plan design, implementation, and service

## **R**eliable | Real People, Real Answers

- Proven Service Excellence – 4.85 out of 5 stars\* 2025 Client Survey
- Dedicated 1-to-1 Benefits Consultant for every plan
- Direct access and accountability – no call centers
- 98% client retention rate as of 12-31-2024

## **P**artner | Personalized and Proactive

- Focus on your retirement plan so that you can focus on your business
- Build long-term relationships and measurable results
- Partner with financial advisors to support their clients' retirement plans
- Collaborate with leading recordkeeping platforms nationwide

**That's the ERP Experience**

401(k) PLANS | DEFINED CONTRIBUTION PLANS | CASH BALANCE | DEFINED BENEFIT PLANS



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# Let's talk.

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## Real People, Real Answers

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