

## Retirement Plan Advisors Expands Participant Advice Solutions Partnership with Stadion Money Management and EPIC Retirement Plan Services brings professional asset management and participant personalization to more working Americans

**CHICAGO, IL – August 30, 2022** – Retirement Plan Advisors, LLC (RPA) continues to partner with industry-leading firms to expand its managed account platform, *PortfolioPlus*. This newest partnership with Stadion Money Management (Stadion) and EPIC Retirement Plan Services (EPIC) brings RPA’s proprietary manager due diligence and portfolio construction process as well as Stadion’s robust participant-level personalization to EPIC’s national recordkeeping platform.

An advisor managed account (AMA) program provides investment solutions customized to retirement plan participants’ specific needs and goals. This new AMA offering combines RPA’s decades of portfolio construction experience with Stadion’s proprietary personalization methodology to provide personalized investment solutions for working Americans. As participants approach retirement, a person’s new and changing needs, along with their unique circumstances, meaningfully impact their optimal investment strategy and allocation.

Per RPA President Josh Schwartz, “Target date funds are great for younger employees – who should invest largely in equities and ride out the ups and downs. But they don’t work nearly as well for people at or near retirement. Retired and retiring Americans have vastly different circumstances, and their investment portfolios need to reflect that.”

“Financial markets are volatile and uncertain, and behavioral science demonstrates that investors don’t manage their assets well on their own. Investors are asking for help, and we are providing it through our managed account solution.”

“We are thrilled to be part of RPA’s expansion of *PortfolioPlus* with EPIC,” said Stadion Senior Vice President of Retirement Solutions Kerr McGowan. “Stadion shares RPA’s focus on the participant, believing that we all can take an active role in helping people better prepare for retirement. Our firm has over 20 years of experience helping participants, which will be harnessed in this new partnership with RPA and EPIC.”

“EPIC is proud to offer the open-architecture backbone that enables RPA and Stadion, two industry leaders, to deliver their best thinking to help Americans retire,” added EPIC Senior Director of National Sales Brian Lenz. “By eliminating managed account administration fees and proprietary product requirements, we’re able to couple a compelling price point with conflict-free investment advice to serve those who need the most help.”

### About Retirement Plan Advisors (RPA)

RPA is an independent federally registered investment adviser specializing in providing customized investment solutions to public sector retirement plans, helping their employees retire better. The firm has been providing managed account solutions since 2005, and provides plan and participant investment advisory and fiduciary services to employers of all sizes. Today RPA proudly serves more than 550 employers with 79,000+ participants and \$4.8 billion in assets under advisement.

### About Stadion Money Management (Stadion)

Established in 1993, Stadion is headquartered near Athens, Georgia. Stadion, a wholly owned subsidiary of Smart, works with financial professionals, asset managers, and recordkeepers to build custom retirement plans and participant level investment solutions. Stadion Money Management, LLC (Stadion) is an investment adviser registered with the U.S. Securities and Exchange Commission. Registration does not imply a certain level of skill or training. More information about Stadion, including fees, can be found in Stadion's ADV Part 2, which is available upon request.

### About EPIC Retirement Plan Services (EPIC)

EPIC Retirement Plan Services is dedicated to meeting the recordkeeping, administration, actuarial, marketing, and communication needs of an ever-evolving retirement plan marketplace. EPIC's mission is to set the leadership standard in delivering innovative solutions, progressive technology, and exceptional client service.

#### **MEDIA CONTACT**

Caitlin Cunningham  
Retirement Plan Advisors  
312.701.1100 x231  
ccunningham@retirementplanadvisors.com