

BCG Benefit Consultants
Group

Reaching New Heights!



A bright future awaits!

Since 1958, Benefit Consultants Group has been instrumental in shaping the future of the retirement plan industry. We're proud of our accomplishments and pleased to celebrate our rich, distinctive history with you. Our longevity and success would not be possible without the extraordinary efforts 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

1960s

- 1967**
 - Robert Paglione joins BCG
 - Develops retirement plan administration software
- 1968**
 - Robert Paglione serves on ASPPA Board of Directors
- 1969**
 - First defined benefit plan approved in NJ for professional corporation

1970s

- 1972**
 - BCG creates first ESOP in PA
- 1979**
 - BCG Executive sits on President Carter's Commission for Pension Policy

1980s

- 1982**
 - BCG submits its first 401(k) to IRS
 - Participates in electronic government filings
- 1987**
 - Moves to expanded new corporate facility

1990s

- 1996**
 - Introduces "Plan in a Box"
- 1998**
 - Becomes SAS-70 Certified
 - Becomes nationwide service provider
 - BCG University established

BCG Fast Facts:

- Over 56 years of experience
- A national leader in retirement plan administration
- Provides retirement services for over 2,500 employers nationwide
- Offers unmatched access to consultative talent (CPA's, actuaries and ERISA attorneys)
- Specializes in servicing the small- and medium-sized retirement plan market (1 - 13,000 employees)
- Offers the most flexible open architecture platform with over 21,000 mutual funds, ETF's and insurance products

Plan Offerings:

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



2000-2006

- 2001**
 - Expands sales offices throughout the USA
- 2002**
 - Creates real-time workflow technology
- 2004**
 - Receives the DalbarCommunications Seal of Excellence
- 2005**
 - Ranked #5 in the Philadelphia Journal as Top Benefits Consulting Firms
- 2006**
 - Creates an electronic IRA rollover solution
 - Ranked #6 in Philadelphia Top 25 Employee Benefit Consultants

2007-2010

- 2007**
 - Develops ISO Quality Assurance Program
 - Executive joins Board of Directors Council of Independent 401(k) Recordkeepers
- 2008**
 - ***Celebrates 50th Anniversary***
 - Receives ISO 9001 Registration
 - Introduces ETF platform
- 2009**
 - Announces 401(k) X-Ray Service
 - Develops "Concierge Club" Reward Program
- 2010**
 - Ranked Top Providers by Plansponsor Magazine
 - Forms BCG Bankruptcy Retirement Plan Services

2011 - 2014 & Beyond

- 2011**
 - Founding Members of Carz N' Toyz
 - Receives recertification in triennial ISO 9001 audit
 - Philadelphia Journal's List of Largest Employee Benefits Firms
 - Initiates Strategic Acquisition Partnership Program
- 2012**
 - Philadelphia Journal's List of Largest Employee Benefits Firms
 - Surpasses \$2 Billion in AUM
 - Financial Services Institute (FSI) Advisory Council
- 2013**
 - Launches *AdvisorEdge*
 - Created Excellence First initiative for plan sponsors
 - Philadelphia Journal's List of Largest Employee Benefits Firms
- 2014**
 - Moves to new Corporate Headquarters
 - Surpasses \$3 Billion in AUM

Our Mission, Our Firm

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

Our people and our clients are our most important assets!



BCG is the first retirement plan provider in the country to receive an ISO 9001 Registration for Quality Management.



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