The Power of the

NAATP Retirement Solution

An Innovative Retirement Program powered by TAG Resources

The National Association of Addiction Treatment Providers has partnered with well-known retirement industry providers to offer the NAATP Retirement Solution, powered by TAG Resources, LLC, the largest “end to end” 401(k) provider in the United States.

The **NAATP Retirement Solution** is a solution for organizations that allows you to offer a retirement plan to your employees, while reducing your administrative burden, transferring fiduciary risks, and potentially reducing costs. Sponsoring and maintaining a retirement plan can be challenging. The **NAATP Retirement Solution** brings together a team of professionals on your behalf so you can focus on running your organization, not your retirement plan.

By leveraging the total assets of all plans in the TAG Program we provide:

- Reduced administrative burdens for your plan.
- Potential cost savings through economies of scale.
- Outsourced fiduciary liability to the greatest degree allowed by law to help reduce fiduciary risk.
- A robust investment menu.
- Participant educational tools and resources to help your employees pursue the retirement readiness they deserve.
- A team of professionals to support the compliance and management of your plan.

**What are the potential cost savings?**

When comparing the potential costs of sponsoring a retirement plan on their own in the open market, participating employers may realize lower investment costs through aggregated assets, and reduced costs for document preparation, compliance testing, Form 5500 filing, and quarterly participant statements. In addition, the **NAATP Retirement Solution** has negotiated a significant cost savings for organizations that are subject to an annual audit.
What fiduciary support will I receive?

The fiduciary support you will receive from the **NAATP Retirement Solution** combines all of the components of a sound process – an investment policy statement, investment lineup assistance, investment selection and monitoring, ongoing reporting, payroll integration and more.

As the employer, you can delegate your fiduciary responsibilities to the greatest degree allowed by law, and have confidence that your fiduciary obligations are being met.

In a time of increasing government oversight and compliance, these are significant benefits to your organization.

What administrative support will my organization receive?

Underestimating the administrative hours required to properly operate a 401(k) retirement plan is a common mistake. By participating in the **NAATP Retirement Solution**, you are relieved of a significant number of tasks including, but not limited to:

- Form 5500 filing
- Nondiscrimination testing
- Investment of plan contributions
- Tracking contribution limits
- Tracking catch-up contributions
- Required communications
- Approvals and denials of hardship requests
- Distribution processing
- Monitoring of pending legislative actions
- Merger and acquisition support

What plan design options are available?

The **NAATP Retirement Solution** allows each participating employer to take advantage of many plan design alternatives. You retain control of vesting, eligibility requirements, matching contributions, profit sharing, automatic enrollment, and general plan design.

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**How can I learn more or get started?**

If you would like more information about becoming a participating employer in the NAATP Retirement Solution, please contact us at:

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