

# Newport by the Numbers



**Over 25%**

OF THE FORTUNE 500  
AS CLIENTS

**\$120+**

BILLION IN RETIREMENT  
ASSETS UNDER  
ADMINISTRATION

**22,000+**

PLANS

**\$265+**

BILLION IN CORPORATE  
RETIREMENT AND  
INSURANCE ASSETS

**1.4+**

MILLION PLAN  
PARTICIPANTS

**#1 Servicer**

NON-QUALIFIED DEFERRED  
COMPENSATION PLANS\*

**35+**

YEARS OF GROWTH

**Award-Winning**

SERVICE

**The Leading**

BOLI  
PROVIDER

**25 Offices**

NATIONWIDE

**Over 1,350**

EMPLOYEES

Newport is consistently rated a top retirement services provider by independent third parties. With over 35 years of consistent growth and a client list containing over 25% of the Fortune 500, we are fast becoming the standard in unbiased, client-focused retirement services.

\*2019 PLANSPONSOR magazine, DC Recordkeeping Survey

Our collective vision  
began, humbly enough, with a simple goal:  
**raise the bar in retirement services  
by operating without the bias and hidden  
costs compromising the industry.**

We saw a market troubled by obscured motives; a dated approach that impeded millions as they strove to save for retirement. And we saw how lack of expertise could compromise plan offerings, increase expense, and ultimately hinder retirement readiness for our clients' employees. We knew there had to be a better model that would elevate the level of trust in the industry. So we set out not only to anticipate the direction of retirement services, but to help redefine it.

**THE NEWPORT DIFFERENCE WOULD BE  
THE TRANSFORMATIVE CORNERSTONE FOR CHANGE**

*We pledged never to use retirement services to sell  
proprietary products like mutual funds and insurance.*

*We vowed never to hide our fees.*

*We committed to independent advisors  
to support unbiased guidance.*

Our advanced expertise, objectivity, and vision are evident in every client relationship, allowing us to always provide partnership and support for what we believe is the foundational touchstone that advisors, companies, and employees depend upon today: trust in their future.



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