



Building a Better Retirement Plan

for employers and their
plan participants



Retirement • Insurance • Consulting

At Newport Group, helping employers create a more secure retirement for their employees is what we do.

How do we do it?

By bringing extraordinary in-house resources and “bench strength” to every aspect of contemporary retirement plans.

How are we different?

Newport Group takes a collaborative, consultative approach to building retirement plans. The result: plans that can increase engagement, participation, and deferrals.

We work with you to develop and deliver solutions to meet the unique needs of your plan and your employees.

- Full suite of retirement solutions
- Administrative support makes the complicated easy for plan sponsors
- Simple enrollment options and easy-to-understand education campaigns
- Communication programs that engage participants in meaningful ways
- Newport Group encourages saving for retirement and being retirement ready
- Call center and website products that make it easy to participate in a plan



Plan Participant Services, Delivered Efficiently



Printed materials customized to your plan



Individual plan participant meetings



Group enrollment presentations and educational meetings



Online account services and web-based education and advice



Toll-free call center

Plan Management, Made Easy

Newport Group offers state-of-the-art plan administration, recordkeeping, and trust services. You get leading-edge technology, easy-to-read plan participant statements, comprehensive plan accounting, and fully integrated systems—all overseen by a single point of contact for managing conversion and administration from start to finish.

When you need help, you can rely on a dedicated team of Newport Group professionals.

Newport Group can help keep your plan compliant with a full spectrum of services, from testing, government reporting, and Form 5500 filing. We offer fast, flexible reporting and document services. Our actuarial professionals help align your retirement benefits with the needs of your company and employees.

Best of all, Newport Group is transparent and unbiased. We are independent and all services are always investment neutral. Newport Group fees are fully disclosed so you can be confident there are no hidden surprises.

These are just some of the reasons why Newport Group is recognized year after year for providing award-winning service in the areas that matter to plan sponsors.*

*Plansponsor magazine survey of defined contribution providers, 2004–2018.

A Collaborative Approach

At Newport Group, we recognize that one size does not fit all. That is why we believe our collaborative approach is so important.

Newport Group has a team of experienced plan design consultants, actuarial and benefit plan compliance experts, and in-house technology innovators to help you build solutions that meet your unique needs today—and help you plan for your company's future.

Newport Group offers a full suite of retirement solutions, allowing you to create an optimal retirement program. All the while, your Newport Group team will be there to help guide you through the process, making the complicated easier.

\$265+ Billion

**in Corporate Retirement
and Insurance Assets**



**Award-
Winning
Service**



**1,350 Employees
Nationwide**



**Qualified and
Non-Qualified Plans**

**Offices
Nationwide**

All numbers as of 6/30/2019

Newport Group:
Your first and only call
for retirement solutions.

Laser Focus on Retirement

Newport Group is more than a recordkeeper, more than a specialty boutique provider. We are a full-service provider.

Newport Group designs and administers retirement and benefit plans of every size, type, and business requirement, and has done so for firms in virtually every sector of American business.

We offer a full-range of solutions:

The word cloud features the following terms:

- Qualified Plans** (largest text)
- ESOPs**
- Cash Balance**
- MEPs**
- Profit Sharing Plans**
- COLI (Corporate-Owned Life Insurance)**
- Newport Trust Company**
- Retirement Plan Consulting**
- Money Purchase Pension Plans**
- Unique Plan Combinations**
- Payroll Integration**
- Non-Qualified Deferred Compensation Plans**
- SERPs**
- BOLI (Bank-Owned Life Insurance)**
- 401(k)**
- 457**
- 403(b)**
- Defined Benefit Pension Plans**
- Compensation Consulting**
- 3(16) Fiduciary Services**

Best of all, we offer competitive pricing with a fully transparent fee structure. And our open architecture allows you to choose investments that best meet the goals of your company's retirement plan.

Our Clients

Newport Group serves virtually every sector of American business, including:

-  Airline and Travel
-  Apparel and Fashion
-  Automotive
-  Banking
-  Chemicals
-  Insurance and Financial Services
-  Medical Services and Physicians Groups
-  Public Utilities
-  Real Estate
-  Restaurants and Food Service
-  Retail
-  Technology

With Newport Group, your retirement program is backed by the power of a national firm. Newport Group is one of the leading independent retirement providers in the country. We have 1,350 employees in offices coast-to-coast to support you and your plan participants.

When it comes to supporting clients, no one emphasizes it more than Newport Group. For more than 30 years, Newport Group has been meeting the distinct financial needs of employers and their employees, and has done so for hundreds of the country's largest and best-known companies.

While our company has grown, our goal remains the same: providing superior service to our clients and their employees.

30+
Years of Steady Growth



22,000+
PLANS
Serving small, middle and large market clients.

1.4 Million
Plan Participants



Retirement Assets
Under Administration:

\$120+ Billion

All numbers as of 6/30/2019

How We Do Business

Newport Group has become a leading independent retirement and benefits provider by building its client base in conjunction with financial advisors and strategic alliances in the financial services arena.

Newport Group offers a depth and breadth of services that materially broadens and deepens the product, and service offerings of the advisors we work with. The quality, integrity, and dependability of Newport Group's services are the reasons our advisors and strategic alliances trust us with their most important assets: their clients.



Find Out More

We can help you build a better retirement plan for your plan participants. Contact us today to learn more about Newport Group and our retirement plan services.

newportgroup.com



newportgroup.com

Newport Group
1350 Treat Boulevard, Suite 300
Walnut Creek, CA 94597