



News Release

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For Immediate Release

BPAS Hires New York City Wholesaler

Syracuse, NY (September 5, 2017) — BPAS, a leading national provider of retirement plan and fund administration, transfer agency, collective investment fund, and other institutional trust services, announced today that Donna Kramer has joined the firm as an External Wholesaler located in the New York City area. Donna's focus will be on marketing the firm's DB and DC administrative services in partnership with Advisors, Corporate Trustees and other financial intermediaries in the greater New York City (NYC) region.

Donna brings a wealth of industry experience to BPAS. She spent the last 25 years at an advisory firm in the NYC metro area. During her tenure, Donna developed an expertise marketing to and servicing non-profit organizations with a particular emphasis on executive compensation programs. She has supported hospitals and physician groups, developed participant education strategies, and acted as a liaison between Plan Sponsors, their ERISA attorneys, and retirement plan committees.

"I am extremely eager to begin identifying BPAS partnership opportunities in the New York City area," said Kramer. "With my experience on the advisory side of the table, I understand what advisors are looking in a partnership with an actuarial and administration firm like BPAS. They want a true value provider to help them grow their retirement business -- not just an order taker. I have always supported the BPAS value proposition and feel fortunate to be part of the team."

Paul Neveu, President of BPAS Plan Administration & Recordkeeping Services noted, "We are thrilled to have Donna Kramer join our firm. Considering Donna's knowledge of both the DB and DC marketplace and her extensive experience working with plan sponsors, she'll be an outstanding resource to financial intermediaries in New York City and surrounding areas."

Through a structure implemented in 2016, BPAS services financial partners through a combined approach involving External Wholesalers and Sales Relationship Managers. This strategy delivers onsite assistance during the sales process, plus strong relationship management services to maintain successful books of business. Donna will be assigned an initial caseload of financial intermediary partners and will add new partnerships through her sales efforts.

Vince Spina, President of BPAS Actuarial & Pension Services added, "At BPAS, our goal is to fill the sales team with seasoned, consultative professionals rather than flashy sales people. We are privileged to have found someone with Donna's experience and drive to fill this important role."

About BPAS

BPAS is a national provider of retirement plan and fund administration, transfer agency, collective investment funds, and other institutional trust services. We support 3,800 retirement plans, \$52 billion in trust assets, \$1 trillion in fund administration, and more than 400,000 participants. With our breadth of services, depth of creative talent, and financial resources, we are well positioned to help our clients solve all their benefit plan challenges without the need to engage multiple providers. One company. One call.

The BPAS family of services includes: Plan Administration & Recordkeeping, TPA, Actuarial & Pension, VEBA & HRA/HSA, Fiduciary, AutoRollovers & MyPlanLoan, Healthcare Consulting, Transfer Agency, Fund Administration, and Collective Investment Funds.

Specialty practices include: Auto Enrollment Plans, Multiple Employer Plans and Multiple Employer Trusts, Plans with Employer Securities, Puerto Rico Section 1081 plans, VEBA / HRA plans, Cash Balance Plans, Collective Investment Funds, and Fund Administration.

BPAS subsidiaries include: Hand Benefits & Trust, NRS Trust Product Administration, Global Trust Company, and BPAS Trust Company of Puerto Rico.

As a solutions-oriented national practice, we are committed to “Solving Tomorrow’s Benefit Challenges Today.” Visit bpas.com for more information. For Advisors or Corporate Trustees seeking additional information, please send an email to TrustSales@bpas.com or call us at 866-401-5272.