



News Release

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For Immediate Release

BPAS Hires West-Coast Wholesaler

Utica, NY (April 30, 2018) — BPAS, a leading national provider of retirement plan and fund administration, transfer agency, collective investment fund, and other institutional trust services, is pleased to announce the addition of **Nathan Charleson** as an External Wholesaler located in the west coast region.

“We are thrilled to have Nate join BPAS as we expand our presence on the west coast,” said Paul Neveu, President of DC Services at BPAS (BPAS Plan Administration & Recordkeeping Services). “While BPAS has clients in all 50 states and the Commonwealth of Puerto Rico, we see the west coast as a future growth area. Nate is already well established in the California Advisor community. His knowledge and reputation, coupled with the unique value proposition and capabilities of BPAS, make for a winning combination.”

Nate brings to BPAS nearly 20 years of experience in consulting on Defined Contribution, Cash Balance, Defined Benefit, and Non-Qualified Retirement Plans. Prior to joining BPAS, he held sales and marketing positions on both the east and west coast for other asset management or administration firms. He holds designations for the FINRA Series 7, FINRA Series 6, FINRA Series 65, FINRA Series 63, National Institute of Pension Administrators (NIPA), Accredited Pension Representative (APR), Chartered Retirement Planning Counselor (CRPC®), and CA/MA Variable Life Insurance. He also earned a Masters in Finance from Brandeis University in Waltham, MA.

Neveu added, “In the new paradigm, advisors want true open architecture, fee normalization, HR outsourcing, auto enrollment/escalation and informed discussions of plan design. And while fees are always important, advisors are demanding more than ever from administration firms. BPAS is committed to this model and to expanding our partnerships on the West Coast.”

Nate is based in Huntington Beach, CA. He will work closely with Investment Advisors and Trust Companies to build successful retirement plan partnerships, practices and consulting services in the areas of fiduciary, plan design, investment analysis, and more.

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, \$77 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, Trust, 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.