



News Release

Media Contact:

Susie Playman | CMO | BPAS
315-292-6900 | splayman@bpas.com

For Immediate Release

BPAS Hires Texas-Based Wholesaler

Syracuse, NY (February 22, 2018) — BPAS, a leading national provider of retirement plan and fund administration, transfer agency, collective investment fund, and other institutional trust services, announced today that **Joe Long** has joined the firm as an External Wholesaler located in the South Central region.

“After an extensive search process, we are pleased to introduce Joe Long as our new external wholesaler in the South Central region,” said Paul Neveu, President of BPAS Plan Administration & Recordkeeping Services. “His background, expertise, and knowledge of the industry will make him a great asset to our financial partners, helping them build their businesses across all plan types and plan sizes. Continuity and stability of relationships are things we pride ourselves on at BPAS.”

Continuing the work of Kay McManus, who will be retiring from the firm, Joe will market BPAS retirement plan services in partnership with Advisors, Corporate Trustees, and other financial intermediaries across the South Central U.S. He brings to BPAS more than 25 years of industry experience in sales relationship management. He is a Certified Pension Consultant (CPC), Certified Employee Benefit Specialist (CEBS), Qualified Pension Administrator (QPA), Qualified Pension Financial Consultant (QPFC), and an Accredited Investment Fiduciary (AFP).

With continuous growth in the South Central U.S. – and Texas in particular – BPAS recognized a real opportunity to bring new solutions to Advisors and Corporate Trustees in this region who focus on qualified plans.

According to Brian Douglas who manages BPAS external wholesalers, “In the \$1 to \$50 million plan space, many employers are still using legacy platforms or solutions that can be improved upon. With our story of true open architecture, HR outsourcing, fee normalization and a vertically integrated model, we think there is a big opportunity to bring better solutions to plan sponsors in this space. We’re looking forward to Joe’s talents in building partnerships and sharing the BPAS story.”

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, \$60 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.