



Make the most of your business' retirement plan.

With ADP Strategic Plan Services (SPS), you can rely on us to provide investment services that are designed to fit the needs of your plan and mitigate your risks involved with fiduciary obligations to offering a diversified fund menu.

ADP Strategic Plan Services can help ease the fiduciary burden of selecting and monitoring your plan's investment lineup.

Protection from Fiduciary Risk

When it comes to selecting plan investment options, you have a legal responsibility to follow the fiduciary standards outlined in the Employee Retirement Income Security Act (ERISA). This is a high standard that requires certain levels of expertise in areas like investment selection and monitoring, among others.

Hiring SPS as your investment manager also reduces the risks associated with certain third-party, ERISA-related lawsuits pertaining to investment selection and monitoring. In FY '18, the EBSA recovered \$1.6 billion for the benefit of plans, participants, and beneficiaries.¹

This included:



\$807.7 million
from over 1,329
civil investigations¹



\$443.2 million from
resolving informal
participant complaints¹

Find the right investment service for your plan

With two flexible services to choose from, you can select the investment support best suited to your plan needs.

3(21) Investment Advisory Services

Provides advice and guidance to your plan's investment fiduciary and assists with the selection and monitoring of your plan's investment options.

- I already have an investment manager or committee.
- I am seeking additional guidance with selection and monitoring.
- I want to be involved in making critical investment decisions for my business.

3(38) Investment Management Services

Acts as an investment manager for your plan and assumes full investment discretion for selecting, monitoring, and replacing investment options for your plan.

- I need an investment manager for my plan.
- I want someone to perform the selection and monitoring for me.
- I want a do-it-for me approach to making critical investment decisions for my plan.

Meet the experienced sales team
behind ADP Strategic Plan Services

Our Investment Committee is there to help you make the most of your retirement plan.

Put ADP Strategic
Plan Services to
work for you today.

NAME

EMAIL

PHONE

COMPANY NAME

James Buccella, CMFC®
President of ADP Strategic Plan Services
29+ years experience

Experience in retirement, trust services, and investment client experience

OF EMPLOYEES

ZIP CODE

I wish to be contacted by an ADP representative

Current ADP Client?

Yes No

Russell Sullivan, CFS®
Investment Committee Chair
15+ years experience

Submit

We respect your **privacy**.

Accountable for platform-level investment oversight, operations, and support

Greg Anderson, CMFC®
Member, Investment Services Committee
14+ years experience

Responsible for reviewing, reporting, and pricing evaluations

Kevin Merrow, CFP®, CMFC®, CRPS®
Member, Investment Services Committee
13+ years experience

Conducts investment analysis and performance reporting

ADP Strategic Plan Services FAQs

What is ADP Strategic Plan Services, LLC?

ADP Strategic Plan Services, LLC is an affiliate of ADP, LLC (ADP) and a separate, indirect subsidiary of Automatic Data Processing, Inc. that provides fiduciary investment management services including the analysis, selection, monitoring, and if necessary, replacement of investment options on behalf of employer-sponsored retirement plans.

Why was ADP Strategic Plan Services created?

How can ADP Strategic Plan Services help strengthen my business's retirement plan?

Why is an investment service good for my business?

1. EBSA Fact Sheet "EBSA restores Over \$1.1 Billion to Employee Benefit Plans, Participants and Beneficiaries"

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