GRP ANNOUNCEMENT

2025 Retirement Plan Client Agreement Enhancements

Examples of some of the latest enhancements:

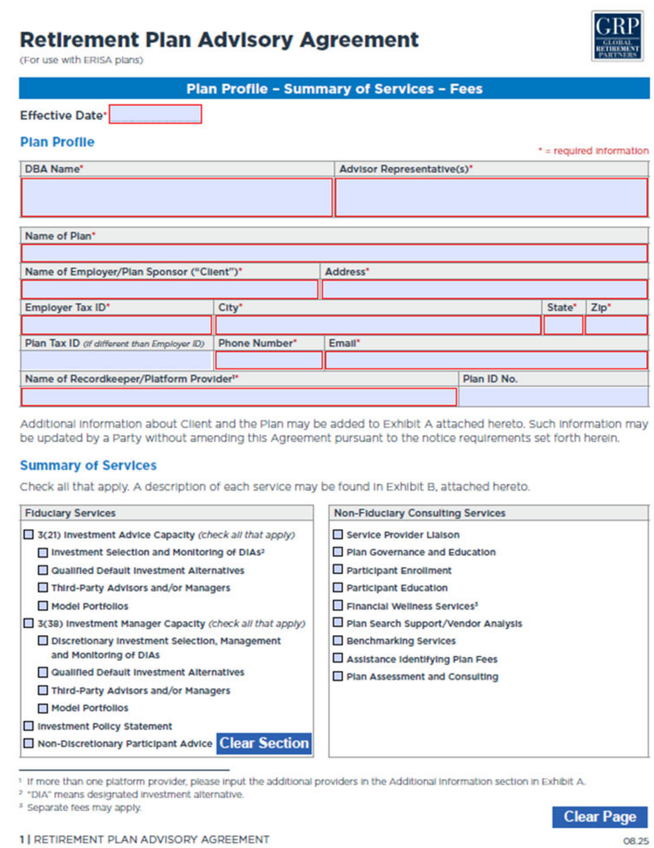
Formatting

- Team brand (DBA) and IAR name fields have been relocated to the top of page one for increased visibility.
- "Comp Code" field has been moved to the fee section (page 2).
- Tiered/breakpoint fee section now offers greater flexibility.
- "Additional Comments and Notes" field has been expanded to enable teams to include pertinent fee and service information.

Services

"Plan Assessment and Consulting" has been added as a new service option "Plan Design Consulting" has been removed. We believe "Plan Assessment and Consulting" better encapsulates the non-settlor services most commonly provided by our advisors to their clients.

Note: Advisors who elect to provide true Plan Design services will utilize a separate document titled *"Amendment – Plan Design Services ("Settlor Services")*.



Retirement Plan Advisory Agreement

(For use with ERISA plans)

GRP GLOBAL RETIREMENT PARTNERS

Plan Profile – Summary of Services – Fees

Effective Date*

Plan Profile

* = required information

DBA Name*		Advisor Representative(s)*	
Name of Plan*			
Name of Employer/Plan Sponsor ("Client")*		Address*	
Employer Tax ID*	City*	State*	Zip*
Plan Tax ID *(if different than Employer ID)*	Phone Number*	Email*	
Name of Recordkeeper/Platform Provider[1]*		Plan ID No.	

Additional information about Client and the Plan may be added to Exhibit A attached hereto. Such information may be updated by a Party without amending this Agreement pursuant to the notice requirements set forth herein.

Summary of Services

Check all that apply. A description of each service may be found in Exhibit B, attached hereto.

Fiduciary Services	Non-Fiduciary Consulting Services
☐ 3(21) Investment Advice Capacity *(check all that apply)*	☐ Service Provider Liaison
☐ Investment Selection and Monitoring of DIAs[2]	☐ Plan Governance and Education
☐ Qualified Default Investment Alternatives	☐ Participant Enrollment
☐ Third-Party Advisors and/or Managers	☐ Participant Education
☐ Model Portfolios	☐ Financial Wellness Services[3]
☐ 3(38) Investment Manager Capacity *(check all that apply)*	☐ Plan Search Support/Vendor Analysis
☐ Discretionary Investment Selection, Management and Monitoring of DIAs	☐ Benchmarking Services
☐ Qualified Default Investment Alternatives	☐ Assistance Identifying Plan Fees
☐ Third-Party Advisors and/or Managers	☐ Plan Assessment and Consulting
☐ Model Portfolios	
☐ Investment Policy Statement	
☐ Non-Discretionary Participant Advice Clear Section	

[1] If more than one platform provider, please input the additional providers in the Additional Information section in Exhibit A.
[2] "DIA" means designated investment alternative.
[3] Separate fees may apply.

Clear Page

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See page 2 for Frequently Asked Questions

Frequently Asked Questions

Do I need to repaper existing Retirement Plan clients with the new agreement versions?

No, client agreements currently in place do not need to be repapered onto the new templates at this time.

What if I have a past version of an agreement out for client signature?

Past versions of agreements that have already been sent out to new clients/prospects for signature will continue to be accepted and processed by GRP home office through December 31, 2025.

In what circumstances should the new agreements be used?

- *Engaging new Retirement Plan Clients*
- *Updating existing Retirement Plan Client fees, services, or terms from past versions*

Can I use the Services Amendment form to update past versions of client agreements?

The new Services Amendment form is designed to only work with the agreement versions v.1 11.24 and newer.

If my client or their counsel would like to request edits to a new agreement template, what is the process?

The procedures for requesting edits to the new agreement templates will remain largely the same:

- ✓ *Have the client or their representative use the tools available in Adobe to mark up the PDF.*
- ✓ *Once redlined by the client or their representative, submit the Agreement and any important context to ContractReview@grpfinancial.com.*
- ✓ *GRP will review the proposed edits and provide a response back to your team to be communicated to the client.*
- ✓ *Once all parties have agreed to any proposed changes, GRP home office will provide your team with a final PDF.*

If I have questions on how to prepare an agreement using the fillable fields, who should I contact?

Consult the Sample Agreement Guide. Specific inquiries or troubleshooting requests can be directed to ComplianceDocs@grpfinancial.com.

If I have questions about which agreement to use, who should I contact?

Consult the Client Forms Checklist available at www.grpfinancial.com. Specific inquiries can be directed to Aimee.Price@grpfinancial.com.

For more information, visit www.grpfinancial.com or contact the GRP Compliance Team.