



The Standard's TPA Partner Payment Program

Effective April 15, 2026

We value our TPA partnerships and are pleased to offer you this program.

401(k) & 403(b) PLANS UP TO \$2MM



First year transferred assets and rollovers:

20 basis points



Paid starting immediately:

5 basis points trail payment

ALL PLAN TYPES \$2MM TO \$25M^{1,2}



First year transferred assets and rollovers:

20 basis points

Payment capped at \$20,000



Paid starting immediately:

5 basis points trail payment³



WANT TO LEARN MORE?

Contact us at TPAServices@standard.com.

To be eligible for this program and receive payments, TPA firms must have a current Letter of Understanding from The Standard on file.

1 All other plan types of any size will also be paid on this schedule, e.g., 457, defined benefit, cash balance, etc.

2 For plans with assets over \$25MM, talk to your sales representative at The Standard to discuss a custom solution.

3 For each covered plan with assets exceeding \$2 million, the applicable payment may be adjusted during the proposal process to (4), (3), (2), (1) or (0) basis points annually. The final pricing applicable to each covered plan will be confirmed with the TPA at the point of sale.

The Standard, 1100 SW Sixth Avenue, Portland, OR 97204 | standard.com

The Standard is the marketing name for StanCorp Financial Group, Inc., and its subsidiaries. Standard Retirement Services, Inc., provides financial recordkeeping and plan administrative services. Standard Insurance Company and Standard Retirement Services, Inc., are subsidiaries of StanCorp Financial Group, Inc., and all are Oregon corporations.