



Introducing Group RHI

Group RHI is an emerging leader in the retirement services industry. Through our operations around the country, we provide expert advice on 401(k) design and services, retirement plan consulting and pension outsourcing.

We are actively acquiring successful TPAs, recordkeepers and actuarial consulting firms. These companies share a commitment to excellent customer service, strong financial performance, and the desire to come together as a strong national competitor in this highly fragmented industry.

Industry Fundamentals

MARKET DEMAND

Retirement – and the financial uncertainties it poses – is an area of increasing concern for the country's aging workforce. Well-publicized pension shortfalls and low levels of retirement savings drive interest from employers and sponsors to design and administer effective plans.

REGULATORY & COMPLIANCE CHALLENGES

The burdens on service providers are increasing dramatically; consequently, the demands for costly information security, compliance, financial and operational audits, and fee transparency will increase as well.

PRESSURE ON SERVICE PROVIDERS

Faced with these challenges, many smaller firms are increasingly at a competitive disadvantage. Group RHI provides financial strength, operational scale and a best-practice operating model to accelerate growth.

Benefits of Working with Group RHI

Owners

- Immediate Liquidity
- Transition Assistance

The Firm

- Increased Capital
- Improved Systems

Staff

- Career Opportunities
- Professional Support

Clients

- Expanded Staff
- Deep Expertise



Group RHI Companies



Tacoma, WA
1,800 Plans



West Palm Beach, FL
1,600 Plans

AMERICA'S



Dallas, TX
800 Plans



Houston, TX
300 Plans



Sioux City, IA
450 Plans

Post-Acquisition Management

Group RHI's integration plan is guided by a healthy respect for preserving the strengths that have spurred each company's success. Customer relationships, strong brands, and unique capabilities are valued and preserved. Post-acquisition, we work to accelerate organic revenue growth, profitability and service excellence by selectively leveraging our scale, technology, financial resources and operational expertise.

Areas Of Interest

Group RHI is seeking to strengthen its capabilities in virtually every facet of retirement services. We are actively pursuing opportunities in:

- Retirement plan design, implementation and recordkeeping
- Administration outsourcing for qualified and non-qualified defined contribution, defined benefit and cash balance plans
- Taft-Hartley / multi-employer pension plan services
- Health and welfare valuation and consulting
- Actuarial services for public sector pension and OPEB plans

For more information, please contact:

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