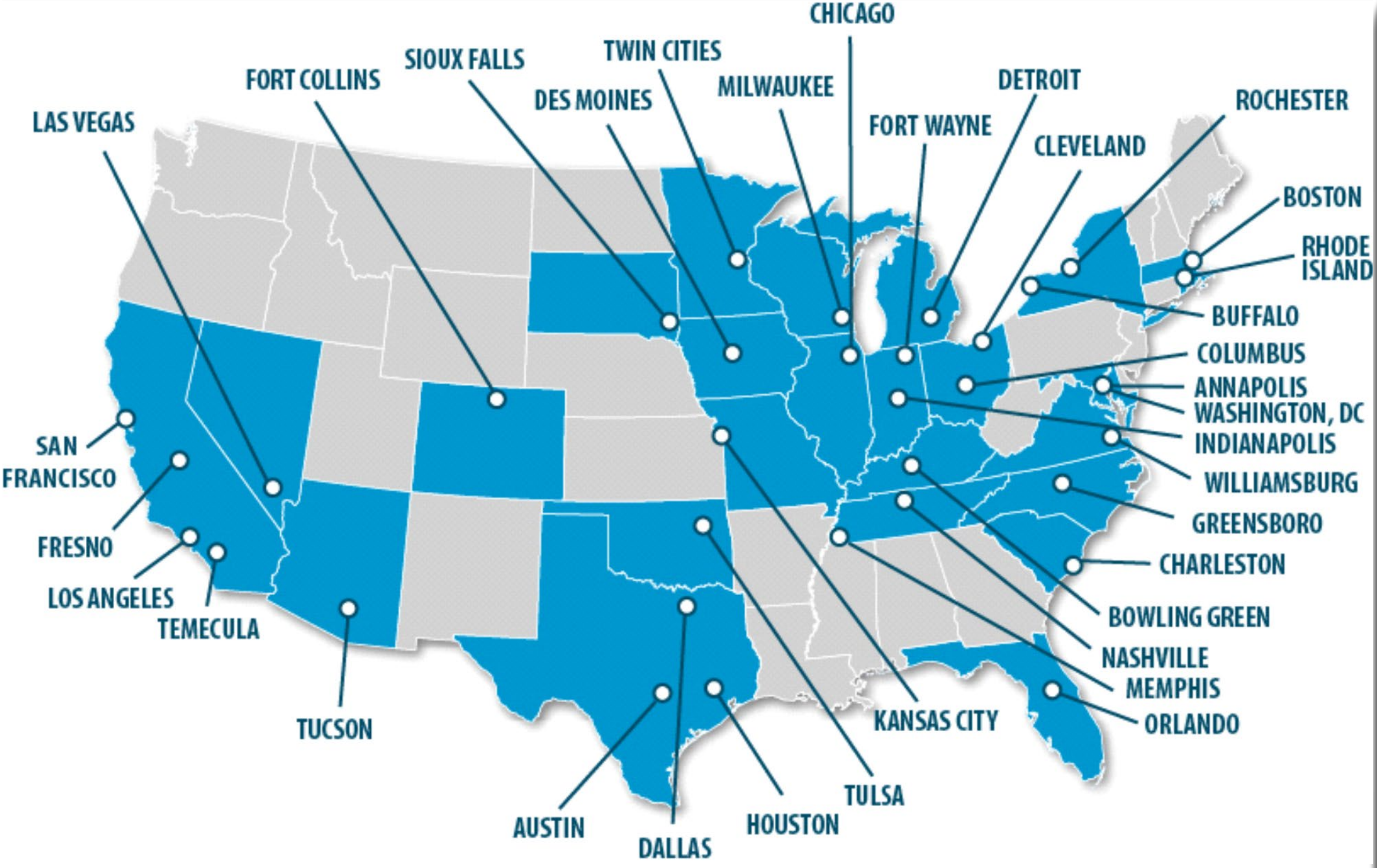
Salvador Diaz

NEVADA ASSOCIATION OF EMPLOYERS

Strategic Retirement Partners

Why SRP?

- SRP **Fiduciary Prudence** - A Formal CEFEX Process to Help You Manage Risk
- SRP **Stability and Trustworthiness** – A Focused Local Team with High Client Retention & 20+ Years of Experience
- SRP **Investment Expertise** – A Formal Investment Committee, Rigorous Process, and "Select" List of Funds
- SRP **Plan Sponsor Experience** – A Focus on Service, Partnership & Skilled Guidance driven by our "Secret Sauce", Operations
- SRP's **Participant Experience** – Independent, Accessible, Customized to Engage Employees & Reflect Your Culture
- Forward Thinking Industry **Thought Leadership** – What's next for Plan Sponsors and Employees – "Skate to where the puck is going to be, not where it has been"



NATIONAL PRESENCE LOCAL SERVICE

CONSULT OVER
1,410 RETIREMENT PLANS
WITH OVER
436,000 EMPLOYEES
AND MORE THAN
$25 BILLION IN ASSETS

Assets, employees, and clients as of 4/1/2026

Your Dedicated Southern California & Las Vegas Support Team

Douglas Bermudez, C(k)P ®, CPFA®, CFS®
Managing Director, Los Angeles

Erin Hall, MBA, AIF®, C(k)P ®, CPFA®, NQPC
Managing Director, Los Angeles

Salvador Diaz, CPFA®
Managing Director, Las Vegas

Michael Ashby
Relationship Manager

Clay Downey, CPFA®
Manager, Client Services

Karsha Banerjee, AIF®, CPFA®
Lead Plan Consultant

Mario Echevarria CFP®
Senior Wealth Advisor

Additionally Backed by our Strategic Resources of SRP:

Jeff Cullen (Managing Partner) and 30 Fiduciary Advisors and 35 Retirement Consultants

Robert Wagner (Chief Investment Officer) and 6 Investment Team Specialists

Rich Lombard
WELLth Advisor & Educator

Deane Mayerhofer (Chief Operations Officer) and 12 Operations Team Managers

Your Partners, Your People, Your Family

Doug Bermudez

THE OUTDOORSMEN

Erin Hall

THE SHOWSTOPPER

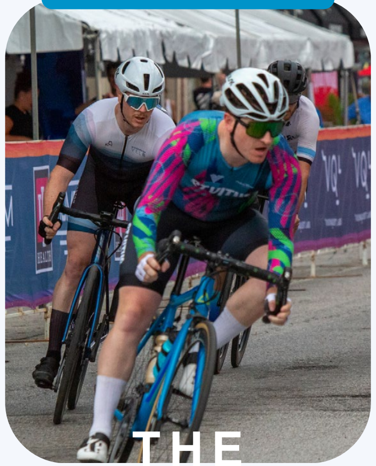
Salvador Diaz

THE ROLE MODEL

Michael Ashby

THE RENAISSANCE Man

Clay Downey



THE CYCLING King

Karsha Banerjee

THE TRAVELER

Mario Echevarria

THE ACE

STRATEGIC RETIREMENT PARTNERS HANDLES THE HEAVY LIFTING FOR YOU

SRP WILL PROVIDE THE FOLLOWING SERVICES:

Administration & Enrollment

- Participant enrollment processing and assistance
- Census review
- Eligibility calculations and notifications
- Contribution rate change processing
- Employee contribution monitoring
- 402(g) limit monitoring and reporting
- Payroll file aggregation and uploading
- Investment election change processing
- Investment fund transfers and rebalancing
- Beneficiary designation maintenance
- Rate change monitoring and reporting
- Termination date verification and maintenance

Compliance & Reporting

- Annual nondiscrimination testing
- Plan document preparation
- Plan amendment preparation
- Summary plan description (SPD) preparation
- Summary annual report (SAR) preparation
- Summary of material modification preparation
- Form 5500 preparation
- Form 8955-SSA preparation
- Audit package preparation (if applicable)
- Year-end data collection and review
- Vesting tracking

Distribution processing and reporting

- Hardship distribution processing
- In-service distribution processing
- Termination distribution approval and processing
- Rollover contribution processing
- Force-out processing (upon request only)
- QDRO calculation and processing
- Loan policy administration
- Loan processing and reporting
- Safe harbor notice preparation
- QDIA notice preparation
- Auto-enrollment notice preparation
- Blackout notice preparation
- Fund change notice preparation

3(16) services provided with Complete and Concierge plans only:

- Corrective distributions approval
- Form 8955-SSA signing and filing
- QDRO determination and approval
- Death benefit distribution approval
- Hardship distribution approval
- ERISA bond review and purchase
- Termination distribution approval
- Form 5500 signing and filing
- In-service withdrawal approval
- Required minimum distribution processing approval

Your ongoing fiduciary responsibilities will include:

- Determining that hiring Strategic Retirement Partners is prudent and in the interest of plan participants
- Determining that Strategic Retirement Partners fees are reasonable for the services provided
- Making any remaining fiduciary decisions for the plan such as approving disability claims, determining how to correct operational errors, and approving distributions.

What Does This Mean For You?

Less work. Less risk. More confidence.

- **Vendor coordination:** We manage recordkeepers, TPAs, payroll providers, and conversions
- **Fiduciary simplification:** Clear guidance, documentation, meeting support, and governance
- **Complexity made simple:** Committee-ready summaries instead of dense, technical reports
- **Built-in accountability:** Processes and systems that catch issues before they become problems
- **Participant education handled:** Meetings, communications, and support

You stay informed and in control—without carrying the administrative burden.

Gain a true partner with SRP.
We're here to listen and help.

- A Robust Participant Experience
- Plan Governance and Fiduciary Prudence
- Focused Service, Partnership and Skilled Guidance
- Stability and Professionalism
- A Formal Investment Committee and Extensive Investment Expertise

STRATEGIC RETIREMENT PARTNERS

Questions?

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