

— GET TO KNOW FUTUREPLAN

Expertise That Powers Better Retirement Outcomes

As a leading retirement solutions partner, we solve your plan challenges and deliver meaningful results. Discover how our unique approach to plan management makes us a true category of one provider.



Trusted Partner



Tailored Outcomes



Ease of Experience

Trusted Partner

Our expertise, scale, and industry relationships uniquely position us to serve as a trusted partner committed to your success.

Unparalleled Expertise:

Over 45 years* of deep retirement expertise servicing and administering plans – engraining it into our DNA.

Leading-edge Infrastructure:

Industry leading innovation leveraging the enterprise capabilities of a world-class financial services organization - including data privacy, cyber security, AI, and technology.

Depth of Partnerships:

A history of established relationships and integration capabilities across the entire retirement ecosystem, including financial advisors, recordkeepers and payroll providers.



41,000+
plan sponsors served



60+
national sales consultants trained in plan design, covering every state



\$134+
billion in assets under administration



1,500+
skilled team members including the largest in-house ERISA desk

*Ascensus founded in 1980

Tailored Outcomes

We listen to your needs and design core retirement solutions that deliver tailored outcomes. From plan design to administration to fiduciary responsibilities, our unparalleled expertise simplifies complex challenges.

Solutions Built for You:

Solutions guided by your goals – with consulting services crafted to align seamlessly with your specific business needs.

Capabilities that Deliver:

Core capabilities integrated across plan design, administration and operations to improve effectiveness and efficiencies.

Outcomes with Impact:

A consultative approach with over 500+ in-house experts* that have a history of designing plans with higher participation rates, greater stability, and improved satisfaction rates.

* A deep bench of experts, including 75+ enrolled actuaries and 470 credentialed retirement professionals

Cash Balance & Defined Benefit

3(16) Fiduciary Services

Non-Qualified & Prevailing Wage

MEPs, PEPs and Group Plan Solutions

Solo Plans (including 401(k) and Defined Benefit)

Ease of Experience

Through our consultative approach, we deliver a consistent and predictable experience that reduces friction and improves oversight of your plan.

Client-first Culture:

An ongoing commitment to refining our service model and investment decisions based on client feedback.

World Class Service:

Dedicated consultants at every stage of your plan, backed by expert teams that hold to a 24-hour response time – even during peak periods with the metrics to prove it.

Operational Excellence:

Relentless focus on improving transparency, responsiveness and data quality – allowing our teams to deliver a consultative, higher-value client engagement.

Ready to put our expertise to work for you?

Contact us today to get started with FuturePlan.

National Sales Desk:

 866-929-2525

 sales@futureplan.com

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