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U.S. Retirement & Benefits Partners Acquires Retirement Business from Midwestern Financial Services Firm

Iselin, NJ, May 1, 2024 – U.S. Retirement & Benefits Partners (USRBP) announced today that it has acquired the corporate retirement book of business from a large Midwestern financial services firm.

USRBP member firm, The Retirement Plan Company (TRPC), which has been servicing many of these clients through a prior outsourcing arrangement, will take over all third-party administration services for the full 401(k) client base, ensuring a seamless transition onto the TRPC platform. USRBP/TRPC is retaining key employees of the firm who have been servicing these accounts. Clients will continue to receive the dedicated local service they are accustomed to, with the additional support of a national company.

Patrick Hale, Managing Partner of TRPC and Private Sector Retirement Solutions, said, “We’re very excited to partner with this firm to expand our service offerings and will continue to provide exceptional service and experience to their clients.”

“The addition of these 401(k) clients under the management of TRPC further expands our retirement plan TPA services in the Midwest as USRBP continues to grow through acquisitions,” said Megan Schneider, USRBP CEO.

About U.S. Retirement & Benefits Partners

U.S. Retirement & Benefits Partners, with headquarters in Iselin, NJ, is one of the nation’s largest independent, national financial services firms specializing in employee benefit and employer-sponsored retirement plans in the K-12 public school, governmental, corporate, and non-profit markets. Through 59 acquisitions throughout the U.S., USRBP serves over 15,000 employer groups with 3.5 million participants. For more information, visit www.usrbpartners.com.

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