



Executive Overview

Coastal Pension Services specializes in the design and administration of retirement plans. We have served the mid-Atlantic business community consistently since 1989. Our industry professionals are some of the most tenured in the region, averaging over 25 years of retirement plan experience and offering an unrivaled depth of insight and expertise. Today, Coastal's 25 employees serve approximately 800 clients with nearly 60,000 plan participants and well over \$1B in assets under administration.

Coastal has enjoyed a 98% client retention rate for the past 3 years.

Coastal is an independent administrative firm that does not sell investments. We work directly with employers and their financial advisors to determine the package of retirement benefits that best meets their needs. Through our partnerships with national retirement plan record keepers, we are able to offer plans that include investment choices from hundreds of fund families covering thousands of mutual funds and ETFs. Unlike some service providers, our unique flexible product lineup allows us to approach each plan sponsor with a blank canvas and create a retirement plan optimized for their specific needs.

Our clients have come to embrace our consultative approach, as we offer a range of services that allows us to anticipate the changing needs of an organization. Clients work one-on-one with an industry professional, to make the administration of their plan effective and efficient.

For more information please contact:

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