



**Benefit Consultants Group**



# EXCELLENCE FIRST

## 5-PART CUSTOMER SERVICE GUARANTEE

**Our commitment to you and your employees is simple and direct – and fully backed by an unsurpassed customer service guarantee. At BCG, your success is our success!**

### **Guarantee #1 - New Plan Installation Fee Guarantee**

Benefit Consultants Group promises you a smooth and trouble-free plan installation. We have the resources to guide you through the entire process. If we do not meet our stated timeline, we will credit your account up to 15% of the installation fee.

### **Guarantee #2 - Conversion Fee Guarantee**

BCG promises you a stress-free retirement plan conversion process. Our procedures and timetables are designed to keep your *conversion* on schedule. Our proactive communication system will always keep you abreast of outstanding items that could potentially impact the installation process. If we have not met our stated timeline for the plan conversion we will credit your account up to 15% of the conversion fee.

### **Guarantee #3 - On-time Statement Processing Guarantee**

BCG promises that your plan participants' *DALBAR Award* winning statements will be mailed in a timely manner. If your statements are not mailed within 20 business days of the close of the plan quarter (excluding delays caused by late receipt of investment performance information), we will credit your account up to 10% of the total record-keeping fee for that quarter. Note: Plans in the implementation phase are exempt.

### **Guarantee #4 - Contribution Processing Guarantee**

BCG promises you an easy and efficient way of submitting plan contributions through our web-based interface. If your contribution is submitted online (using BCG's ACH clearing process) and isn't processed within 3 business days from the date funds are received, we will credit your account \$50.

### **Guarantee #5 - On-time Distribution Processing Guarantee**

BCG promises that it will process your plan participant distributions accurately and on time. If a participant distribution is not issued within 10 business days of our receipt of funds, we will credit your account \$25.

*Credits will be processed upon request and cannot exceed 20% of any calendar quarter's total recordkeeping fees. Program Effective for transactions occurring after August 1, 2005.*



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