

# 2016 PLANSPONSOR Recordkeeping Survey

PLANSPONSOR®

## 2016 Top Recordkeepers

## By Asset Growth

Provider	Type	2015 % Change Assets	2014 % Change Assets
OneAmerica*	Insurance	84.40%	44.10%
Transamerica Retirement Solutions**	Insurance	63.50%	15.80%
<b>Northwest Plan Services, Inc.</b>	<b>Independent</b>	<b>52.80%</b>	<b>33.10%</b>
Alliance Benefit Group***	Independent	30.20%	0.30%
Bank of America Merrill Lynch	Wire House	17.30%	7.20%
Ubiquity Retirement +Savings	Independent	15.60%	19.20%
Insperty Retirement Services	Independent	11.60%	6.50%
INTRUST Retirement	Independent	7.10%	4.30%
Aspire Financial Services	Independent	6.10%	NR
BPAS	Insurance	5.50%	5.30%

\*OneAmerica acquired BMO's DC business in 2015 adding \$26 Billion assets and City National's in 2014 adding \$6.5 Billion in assets.

\*\*Transamerica acquired Mercer's DC business 2015 adding \$71 Billion in assets.

\*\*\*ABG added The Retirement Plan Company in 2015 adding \$3.5 Billion in assets.

## By Participant Growth

Provider	Type	2015 Participant Growth	2014 Participant Growth
OneAmerica*	Insurance	79.5%	17.2%
Transamerica Retirement Solutions**	Insurance	37.8%	12.5%
<b>Northwest Plan Services, Inc.</b>	<b>Independent</b>	<b>21.9%</b>	<b>24.6%</b>
Bank of America Merrill Lynch	Wire House	16.2%	2.6%
BOK Financial	Bank	15.8%	25.6%
Insperty Retirement Services	Independent	15.3%	8.7%
Sentinel Benefits & Financial Group	Bundled	15.1%	3.6%
Ascensus	Bundled	13.4%	-48.1%
July Business Services	Bundled	11.6%	14.5%
CDM Retirement Plan Consultants	Independent	9.1%	13.3%

\*OneAmerica purchased BMO's DC business in late 2015 adding 733k participants

\*\*Transamerica purchased Mercer's DC business in late 2015 adding 917k participants



**northwest plan  
services, inc.**  
Consultants and Actuaries

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