



RETIREMENT PLANS

Participant Data Management

Exclusive technology solution meets TPA needs for accurate data, time savings

Would you like to spend less time tracking down accurate plan data from your clients? Participant Data Management from The Standard is a great solution.

Accurate employee data is the key to a healthy retirement plan. Bad data can lead to major problems that take extra time and money for you and your clients to correct. We collect data on all employees with every payroll, whether they're participating in the plan or not.

To make sure plans stay in shape and to keep your business humming, we include Participant Data Management in every plan we offer. Our proprietary data technology solution keeps errors from affecting a plan in the first place. We scrub data with every payroll submission by running more than 90 validations.

Unrivaled Process Helps Plans Run Smoothly

CHECK OUT OUR STATISTICS*



65% of payroll files loaded through PDM had at least one error or warning.



Total of 3.2 million errors or warnings.



We caught 56,000 data discrepancies, which kept money from going into plans by mistake.

(Errors related to ineligible employees and excess loan payments, for example)

98 DATA VALIDATIONS

- 33 warnings
- 65 stop-and-fix errors

*The Standard's internal data from 2020

3 Major Benefits

Get accurate data

- Count on accurate information. Our industry-leading technology includes more than 90 validations with each payroll submission.
- Access current information on vesting, dates of hire and termination.
- Identify sources of money quickly.

Save time

- Get updated data at any time for mid-year testing or census, so you don't have to ask the client for information.
- Trust the year-end census file for annual compliance work.
- We include a dedicated team of data specialists to help set up the process.

Work with a trusted partner

- Trust us to complement, not compete with, your business.



WE INCLUDE OUR DATA TECHNOLOGY SOLUTION WITH EVERY PLAN WE OFFER

Call us at 844.239.3561 to learn more.

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The Standard is the marketing name for StanCorp Financial Group, Inc., and its subsidiaries. StanCorp Equities, Inc., member FINRA, wholesales a group annuity contract issued by Standard Insurance Company and a mutual fund trust platform for retirement plans. Standard Retirement Services, Inc., provides financial recordkeeping and plan administrative services. Investment advisory services are provided by StanCorp Investment Advisers, Inc., a registered investment advisor. StanCorp Equities, Inc., Standard Insurance Company, Standard Retirement Services, Inc., and StanCorp Investment Advisers, Inc., are subsidiaries of StanCorp Financial Group, Inc., and all are Oregon corporations.