

FOR IMMEDIATE RELEASE

Definiti Expands in Midwest with Advanced Plan Designs, LLC

MISSOURI-BASED TPA FINDS NEW HOME WITH DEFINITI

HOUSTON (December 15, 2022) – Definiti, a national retirement services firm, today announced the acquisition of Advanced Plan Designs of Springfield, Missouri.

Founder Susan Humbard started the firm in 2011 and was instrumental in its success, providing retirement services, consulting, third-party administrative and 3(16) fiduciary services to hundreds of companies in the region. After Humbard's passing in late 2021 the management team initiated a search for an acquisition partner that would build on the firm's legacy of first-class expertise and service to its customers.

"We're honored to welcome the Advanced Plan Designs colleagues and clients to Definiti," said Definiti CEO Tom Gaillard. "The firm has a well-deserved reputation for quality work, and we are so pleased that they chose to partner with us. Their staff are already making an impact within our organization."

"Susan focused first on building relationships with our clients, and it was important to find a partner that shares that value. Definiti does. You don't find that all the time, especially with larger companies," said Julie Blevins, Office Manager at Advanced Plan Designs. "Early in the process, Definiti let us know they wanted to retain the talents of the entire team which was part of our search criteria. Losing Susan was unexpected, and I didn't want the team to experience the loss of employment as well."

Tara Calton, Operations Manager at Advanced Plan Designs, noted Definiti's significant experience in successfully integrating other acquisitions into their operations as a key factor in the selection process. "Definiti demonstrated that they were the best suited to handle the acquisition and that gave me confidence in a smooth transition. Definiti also provides our team the opportunity to choose a service specialization and excel in that role."

Advanced Plan Designs will be rebranded as Definiti when the business integration is completed in the first quarter of 2023.

With the acquisition of Advanced Plan Designs, Definiti now has over 250 professional staff servicing close to 10,000 retirement plans across the United States.



ABOUT DEFINITI

From 401(k) plan design and administration, compliance and actuarial consulting, to pension outsourcing and recordkeeping, Definiti helps organizations deliver smart retirement solutions to their employees. With hundreds of experts across the country, including in-house actuarial consultants, ERISA attorneys, document specialists and retirement plan consultants, Definiti helps clients redefine what's possible with workplace retirement plans.

To learn more about Definiti, visit <https://definiti.com>.

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