



FOR IMMEDIATE RELEASE

June 21, 2016

Media Contact:
JConnelly
Amiee Watts
awatts@iconnelly.com
973.850.7312

Vertical Management Systems to Provide its Retirement Revolution Services to NextLevel(k)

Pasadena, CA—June 21, 2016—Vertical Management Systems, Inc. (VMS), one of the nation’s leading providers of data, financial networking and account aggregation technology, is pleased to announce that it has been selected by BCJ Financial Group to provide recordkeeping services for its NextLevel(k) retirement platform.

VMS will oversee approximately 200 plans with assets of more than \$300 million in conjunction with BCJ, an Arizona-based retirement plan advisor.

“Increased scrutiny by regulators over retirement plans makes it more important than ever for plan advisors to increase transparency when it comes to fees,” said **David Carroll, head of the retirement plan group at BCJ Financial Group**. “We chose VMS as recordkeeper for our NextLevel(k) plans because of the benefits offered with its Retirement Revolution service. After reviewing the options, we considered Retirement Revolution the obvious choice for its open architecture, timely and accurate reporting and, most importantly, the ability to provide complete transparency surrounding fees associated with the plans.”

“We developed Retirement Revolution expressly to help plan advisors fulfill their role as plan fiduciaries,” added **Kevin Rafferty, president and CEO of VMS**. “The recent DOL ruling puts plan advisors like BCJ under the microscope by requiring an unprecedented level of scrutiny. With our Retirement Revolution service, retirement plan advisors can rest assured that they will meet the expectations of all their constituents—the plan, plan participants and regulators.”

VMS’s Retirement Revolution offers open architecture—the ability to choose any investment for inclusion in the plan—as well as 100% fee and mutual fund revenue transparency and the ability to calculate income at the participant level, down to the number of days a participant has been in a fund.

For more information about Retirement Revolution and other services offered by VMS, visit vmsholdings.com.

About Vertical Management Systems, Inc. (VMS)

Vertical Management Systems, (VMS) is one of the nation's leading providers of data, financial networking, and account aggregation technology. For more than 20 years, VMS has designed, developed and hosted accounting and securities process-and-control solutions for the largest financial institutions in the United States. Its retirement platform, *Retirement Revolution* is a leading supplier of next-generation retirement solutions. www.vms Holdings.com

About BCJ Financial

BCJ is an organization of nationally-known, elite advisors, each with their own focus. Each firm exists with autonomy, while providing valuable synergy within the context of our "firm of specialists" model. BCJ provides the combination of industry-leading, multi-disciplinary experience with an unbiased client-centered focus. This level of service has historically been available only to the highest net worth sector of our economy. Indeed BCJ serves this segments of clients, and is also flexible enough to serve both small and medium-sized businesses as well as the individual and retirement market.

<http://bcjfinancial.com>