

BOK Financial sweeps best in class awards

Once again BOK Financial ranked among top retirement plan providers in the country in 2021, according to the highly regarded PLANSPONSOR Defined Contribution Survey. Each year, the magazine conducts a survey recognizing the top retirement plan providers in the nation based on the quality of participant and plan sponsor services.

PLANSPONSOR's annual Defined Contribution Survey has been the most important industry benchmark, measuring and evaluating 401(k) and other DC providers according to feedback from their own clients.



Rank #1
BEST PROVIDER "OVERALL"



94%
NET PROMOTER SCORE¹



12
"BEST IN CLASS" AWARDS²

AWARDS FOR "BEST IN CLASS"

Recordkeeping platform

- Plan administration
- Plan design flexibility
- Systems integration

Participant services

- Online/mobile retirement planning tools
- Online/mobile financial wellness offerings
- In-person/virtual participant support
- Enrollment materials and support
- Print/digital communications and education

Sponsor services and support

- Website, reporting and tools
- Account/client service teams

Investments and fees

- Investment options
- Fee value and transparency



Commitment to our clients

Our award winning retirement plan solutions rival those of the largest firms, while our focus on building strong and lasting relationships sets us apart from the competition. We are committed to providing the kind of hands-on, personal service you need to create a retirement plan for your organization.

We invite you to experience the level of customer service and attention that make BOK Financial a “best in class” retirement plan provider. The services you need paired with the personal attention that remains the hallmark of the BOK Financial family of companies.

STRENGTH

We’re part of BOK Financial Corporation, one of the top 25 largest U.S.-based bank holding companies with more than \$50 billion in assets, and with more than \$100 billion in assets under administration entrusted to the care of our Wealth Management division.

STABILITY

We’ve grown alongside our clients for more than a century, taking a long-term, expertise-driven approach to helping our clients succeed.

To learn more about our retirement plan solutions, visit bokfinancial.com.



¹ Net Promoter Score is calculated by subtracting the percentage of customers that are “detractors,” giving a score of 6 or less, from the percentage that are “promoters,” giving a 9 or 10.

² Providers win Best in Class awards by either (1) scoring as one of the top 3 in a given category OR (2) by scoring higher than the benchmark for that asset range, which is 70% for the \$5-\$25 million market category.

³ BOK Financial’s banking subsidiary, BOKF, NA, is among the top 25 nationally chartered U.S.-based commercial banks based on assets as of December 31, 2021, according to the U.S. Federal Reserve.