

• LIVE WEBINAR

The TPA Test: How to Spot a Winner (and Dodge a Dud)





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The TPA Landscape



- They range in size, expertise and specialties
- Can come at the request of an advisor or employer
- Chosen based on specific needs of the employee population



Our goal is to create greater alignment with the employer

What Makes a Good TPA?



Reputation & Experience



Data Handling & Claims Submissions



Transparency & Reporting



Business Model



Service Structure & Outcomes

Poll #1: What's your top priority in a TPA?

Resources for TPA Evaluation



A questionnaire as a baseline to assess any TPA.



Publicly available



Roundstone uses for internal vetting process

Poll #2: Have you ever formally reviewed your TPA's performance?

Advisor Role in the TPA Process

What influences advisors?



Regional/Locality



Ease of Use



Aligned Goals

Your advisor should be involved in...



TPA Selection



Onboarding



Performance Review



Claims Review and Audit Support

Poll #3:

Are you planning to switch or evaluate your TPA in the next 12 months?

Case Study

What's Coming in Webinar 3?

Built Different:

Why Bywater Sets the PEPY **Standard**

October 30, 2025 @ 2:00 PM EST



Learn how Bywater achieves industry leading PEPÝ



Discover why independence matters and how it avoids hidden conflicts



Gain an understanding of why Bywater is a best-in-class TPA

Q&A



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