NPPG Acquires ProManage, Expanding Its Managed Account Capabilities

- **The acquisition expands NPPG's capabilities across pooled employer plans, and managed accounts.**
- **The transaction is the latest in a series of strategic investments by NPPG, bringing the total assets it services to more than $17 billion.**

August 31, 2026 | Shrewsbury, New Jersey — National Professional Planning Group, Inc. (NPPG), a leading U.S. retirement consulting, advisory and ERISA fiduciary services firm, today announced the acquisition of ProManage, LLC (ProManage), an independent U.S.-based provider of personalized retirement solutions and managed account services for institutional 401(k) retirement plans.

On August 24, 2026, NPPG agreed to acquire ProManage from Smart Managed Solutions, Inc. The transaction significantly expands NPPG's capabilities in managed accounts, financial wellness and retirement income, while further strengthening its growing retirement plan and pooled employer plan (PEP) platforms.

With the addition of ProManage, NPPG's platform now supports more than $17 billion in retirement plan assets, serving over 6,000 retirement plans and more than 500,000 participants. The terms of the transaction were not disclosed.

ProManage brings to NPPG an established managed account platform, proprietary technology, financial wellness capabilities, and deep relationships with retirement plan sponsors and participants.

The acquisition creates significant strategic synergies between the two organizations. NPPG brings scale, retirement plan administration, fiduciary expertise and a growing pooled employer plan platform, while ProManage adds sophisticated managed account capabilities. Together, the organizations are positioned to provide a broader technology-enabled retirement platform for their clients.

Through ProManage, NPPG will enable employers to offer participants bespoke target retirement-date account management creating a custom portfolio allocation for each individual participant.

The acquisition adds significant investment, actuarial and quantitative expertise to NPPG. ProManage's leadership team will remain in place, providing continuity for clients while supporting the continued service of large and mega 401(k) plans and the expansion of the combined organization's retirement solutions to the small- and mid-market 401(k) plan segment.

“The acquisition of ProManage aligns with our commitment to delivering innovative retirement solutions that address the evolving needs of employers of all sizes and their participants,” said Michael M. Salerno, CEO of NPPG. “NPPG has built a strong and growing platform in retirement plan administration, fiduciary services and pooled employer plans. ProManage brings highly complementary capabilities in managed accounts, personalization and retirement income that small and mid-sized plans have not previously had broad access to.

We are excited to welcome the ProManage team to NPPG and to continue building a leading retirement platform.”

“Joining NPPG brings together two organizations with a shared commitment to improving retirement outcomes through personalized portfolio allocation solutions,” said Tony Sabos, co-founder and CEO of ProManage. “NPPG has created an impressive platform in retirement plan administration, fiduciary services and pooled employer plans, and we believe ProManage’s managed account technology, investment expertise and retirement income capabilities are highly complementary.”

“This combination provides an excellent platform from which to accelerate the growth of our solutions and expand the ways in which we can help employers of all sizes and participants navigate the entire retirement journey,” said Michael Salerno. “By combining NPPG’s scale and fiduciary expertise with ProManage’s bespoke participant-level personalization, we can broaden access to individualized retirement solutions that have historically been concentrated among the largest plans. We are excited about the opportunities ahead for our clients, our team and the broader retirement marketplace.”

About National Professional Planning Group, Inc.

National Professional Planning Group (NPPG) and its related companies provide comprehensive retirement planning, administration and ERISA fiduciary services to retirement plan sponsors nationwide. Serving as an intermediary fiduciary, NPPG oversees billions of dollars in retirement plan assets on behalf of thousands of clients, providing fiduciary oversight, administrative expertise and regulatory support.

NPPG’s services include ERISA Section 3(16) administrative fiduciary oversight, third-party administration, retirement plan administration, regulatory compliance, plan correction guidance, and Multiple Employer Plan (MEP) and Pooled Employer Plan (PEP) solutions.

NPPG is building a growing PEP platform designed to provide employers with access to the potential advantages of scale, professional administration and fiduciary oversight while simplifying the management of their retirement programs.

With a diverse client base that includes Fortune 500 corporations, publicly traded companies, government entities, nonprofit organizations, associations, Professional Employer Organizations (PEOs), as well as small and mid-sized businesses, NPPG delivers customized retirement plan solutions designed to address the strategic, operational and fiduciary needs of its clients.

For more information, contact: Ted Key tkey@nppg.com

About ProManage, LLC

ProManage, LLC is an independent U.S.-based managed account and financial wellness provider with $4.33 billion in assets under management as of July 31, 2026. Founded in 1998, ProManage provides personalized retirement solutions designed to help plan participants make better decisions throughout their retirement journey.

ProManage's managed account platform provides personalized investment and retirement planning capabilities through its ProManage PROgram™ and Vision solutions. The company combines investment management, behavioral finance, actuarial analysis and quantitative modeling to develop individualized retirement strategies.

ProManage is also the creator of a financial wellness application that provides employees with a holistic view of their benefits, retirement readiness and financial accounts.

Founded in 1998 as Strategic Financial Concepts, Inc., ProManage subsequently operated as ProManage, Inc. and ProManage, LLC. The company is headquartered in Chicago and is a federally registered investment adviser.

Additional information about ProManage is available at ProManage and through the SEC Investment Adviser Public Disclosure database.

Registration with the United States Securities and Exchange Commission does not imply a certain level of skill or training. Past performance is not a guarantee of future results. All investing involves risk, including the possible loss of principal.