



SIMPLIFY INVESTMENT SELECTION FOR YOUR RETIREMENT PLAN

WE'LL DO OUR THING, SO YOU CAN FOCUS ON YOURS

Managing your organization's retirement plan investment menu on your own entails risk and responsibility: Are you selecting and approving the proper investments to cover a wide range of investment styles and preferences? Are the options you offer performing at their best? Are you following through with the recordkeeping provider to ensure investment decisions are actually implemented?

Let Us Do Our Thing

Save that time and energy and reduce your level of risk by partnering with us to serve as an ERISA 3(38) investment fiduciary manager for your organization's retirement plan offering. As part of a trusted financial services and wealth management firm, our primary strength is investment selection and management. By using our team as your partner, we'll take care of the entire process.

Our team will do the research and develop a suitable investment lineup for you and your employees. From there, we'll work with your plan provider to monitor the various investment performances and replace any options that may be underperforming. That's it—we do it all. Reinvest the time and energy you were spending on plan management back into doing what you do best: developing your employees and running and growing your business.

Key Benefits

- Reduces the stress, responsibility, and time spent on education, investment selection, and continual monitoring
- Provides access to a diverse, world-class investment lineup selected by an experienced team of registered investment professionals
- Creates a carefully selected investment lineup that can potentially improve plan performance, employee satisfaction, and financial well-being
- Gives you more time to focus on your employees, your clients, and growing your business

Talk to your advisor today to get started.

Your plan advisor can help you understand the benefits of leveraging a 3(38) fiduciary manager.

Investors should consider the investment objectives, risks and charges, and expenses of mutual funds carefully before investing. The prospectus, which contains this and other information about the funds, and can be obtained directly from the company or from your financial professional. The prospectus should be read carefully before investing or sending money.

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