> "85% of plans with fewer than 250 participants rely on a bundled service provider."
>
> source: 401khelpcenter.com

The packaged providers have dominated the small to medium plan space, not because they have the lowest cost, not because they have the best investments, and not because they offer flexibility. They dominate because they make it easy to sell.

We have partnered with some of the leading retirement plan companies in the country to offer advisors an unbundled, turn-key, full-service solution that significantly lowers costs, provides the highest quality investments, can be tailored to any plans needs, and is as easy to sell as a packaged product.

Plan Design

Using an unbundled solution avoids the "one-size-fits-all" approach while providing flexibility to meet the unique needs of each individual plan sponsor.

Open Architecture

Access to more than 25,000 mutual funds and ETFs providing the lowest cost, highest quality investment lineups and offering a powerful competitive advantage.

Participant Education

Automated, personalized plan advice for participants using an interactive video software system to provide enrollment support, ongoing engagement, and education.

Fiduciary Support

Fiduciary assistance and access to a 3(38), providing both investment and compliance expertise to protect plan fiduciaries while acting in the best interest of plan participants.

Investment Management

The investment management option gives plan participants the same cutting edge, actively managed investment strategies used by institutional investors regardless of account size.

Low Costs

Fees are disclosed, including investments, administration, recordkeeping, and advisory fees. This makes it easier to fulfill the fiduciary obligation to monitor costs.

Marketing Support

Q3 will provide everything you need to market retirement plans including:

- Lead Lists
- Plan Analysis
- Fee Comparison
- Selling Points
- Custom Proposals
- Branded Materials

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