



Flexible fiduciary: You have options.

3(38) INVESTMENT FIDUCIARY OPTIONS AVAILABLE TO FINANCIAL ADVISORS

Do what you do best. We'll handle the rest.



Use our lineup.

We maintain a robust lineup of funds with a diverse selection of asset classes. This lineup is available to all plans on our platform.



Use your lineup.

Create your own lineup, select your QDIA, and develop as many models as needed to give your clients the exact investments you prefer, all within your partner portal.

Show your lineups, your models, or use our risk-adjusted portfolio building tool to help guide participants into your models.



Use a partner.

We will put you in touch with an outside investment advisor that specializes in 3(38) services. These partners create proprietary investment and model options that are selected for performance and carefully monitored. The partner will consult with you about the best investments for your clients.

These advisors charge additional fees, so make sure your clients are aware of the costs.

