

Managing Your Clients' Workplace Retirement Accounts Pre-Rollover (Now)

401(k)

403(b)

457

401(a)

Help your clients while they are still employed with management of their most significant asset **and earn fee revenue now.**

The Value Proposition

- Full-time professional management replaces risk of “one and done” allocations
- Account now incorporated into your overall financial plan with the client – you receive data on the account for reporting
- Expand your business with pre-retirees by providing a solution for workplace retirement accounts while they are still employed

Key Features

- 1** The assets stay in the plan, same client login and statement.
- 2** The assets receive full-time active management.
- 3** You earn ongoing fee revenue on these assets now.
- 4** Fees come directly out of the account.
- 5** You don't have to be the rep of record on the plan.

Providers



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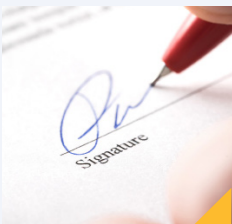
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