

HOW DO YOU WANT TO MANAGE YOUR MONEY?

HANDS *ON* – HANDS *OFF*

WE HELP BUILD A PLAN THAT'S RIGHT FOR YOU



“I’LL DO IT MYSELF”

DESIGNATED FUNDS

We work with the Plan Sponsor to help designate the plan’s core investment options. Designated funds usually cover all asset classes – offering a diverse fund menu to participants.

LIFESTYLE /LIFECYCLE FUNDS

Passively managed portfolios where the asset mix is determined according to either the level of risk and return that is appropriate for your current life situation or your targeted retirement date.

“DO IT FOR ME”

THIRD PARTY MONEY MANAGEMENT

A professional manager has discretionary authority to actively manage your account based on your personal profile.