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Take better control of your retirement security.

Empower your trusted advisor to manage your employer-sponsored retirement account(s) as part of a holistic financial strategy.

The median American family holds nearly

50%

of their net worth in their retirement accounts.[1]

[1]Federal Reserve Survey of Consumer Finances, 2022

[2]Putting a value on your value: Quantifying Vanguard Advisor's Alpha, Vanguard, 2022

The advantages of professional retirement plan account management:

- Benefit from the same trusted advisor expertise you rely on for your other assets
- Minimize volatility risk with proactive account review and rebalancing
- Optimize savings with tax-efficient investment strategies
- Avoid the high expense ratios of target-date funds by opting for actively managed funds customized to your unique situation rather than a predefined timeline
- Retain access to lower fees and institutional funds, which may be lost through rollovers
- Grow your retirement plan value[2]

Ask your advisor how you can get started with professional 401(k) management today.

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