

## SMART RETIREMENT SOLUTIONS for 457



What should you look for when choosing a retirement solutions service provider?

- a. Open investment choices
- b. Cost-effective transparent pricing
- ☒ c. All of the above

The right answer is to pick a service provider who delivers it all.

A service provider who customizes your requirements to successfully market to educators, school district officials, religious leaders, non-profit professionals, and healthcare workers. A service provider who delivers choices. The right service provider is Aspire—an industry leader who simplifies plan administration and improves retirement benefits.

### Customizable by choice

Partnering with Aspire provides your clients with the flexibility and choice to meet their retirement plan goals. Aspire's open-architecture platform—InvestLink<sup>SM</sup>—enables you to configure

the investment offering best suited to your clients' needs—linking to more than 25,000 investment options enabling the ultimate in flexibility and customization for plan design for our TPAs, advisors, sponsors and participants for 457 retirement plans.

Aspire's 457 smart retirement solutions are designed to deliver flexibility in making choices for our strategic distribution partners and plan participants. Our conflict-free open-architecture retirement management system is uniquely positioned to deliver the ultimate in flexibility and transparency at a competitive cost structure with all fees disclosed. For TPAs, advisors and plan managers, the platform is user friendly. For participants, the user portal provides access to viewing account balances, researching investment options, and printing statements.



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We make it  
easy to do  
business with us  
because we are  
an extension of  
your business.

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**The choice is yours:**

- Thousands of open-architecture investment options
- Third-party managed money options available through our strategic partners
- Roth contribution administration option
- Rollover IRA available for continuation of same participant account

**You have the choice in picking the smart company that works best for you—a company that delivers value.**

**The 457 family of smart retirement solutions**

Aspire delivers smart retirement solutions for all 457 plan types with a deep understanding of the different participants, occupations and participant needs. We offer solutions for government and non-profit plans. Aspire's 457 smart retirement solutions are designed to deliver flexibility in making choices for our strategic distribution partners and plan participants.

- **Government** – Aspire provides state and local government and school district employees with flexible options to manage their retirement plan.
- **Non-Profit** – Aspire has a long track record of serving 501(c)(3) organizations with the agility and flexibility to serve all types of non-profit organizations, small charities, and national fundraisers. The plan's advisor can work with portfolio managers to develop a model portfolio with socially responsible investments that correspond with the organization's philosophy.

## Flexible fund and payment design

With advisor guidance, participants have the freedom to select any available investment offered, from thousands of investment options including mutual funds, collective trusts\* and stable value funds\*. Advisors can work with the participant to determine the pay rate and payment method. Compensation can be received as commissions or fee based.

Aspire is all about flexibility, customization, open choices and transparency—all brand traits that point to us delivering our smart retirement solutions your way. We make it easy to do business with us because we are an extension of your business. As a leading service provider of smart retirement solutions, we put our heads together and collaborate on what we think will work best.

\*Not available in all plan types.

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### Benefits of Aspire's smart retirement solutions through online access:

- Portfolio built from thousands of investments through no-conflict open architecture
  - Easy, real-time access to all plan details
  - Web-based plan and advisor search
  - Ability to partner with leading money managers and investment strategists
  - Compensation received as commissions or in a fee-based structure
  - Transparent pricing model
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## Private-label branding grows your business

Complete customized branding solutions are available to our distribution partners who want to seamlessly integrate the Aspire 401(k) smart retirement solutions under their corporate identity to maintain their brand image and their clients' brand loyalty. Customization through our InvestDesign Center<sup>SM</sup> includes visual identity with logo, colors, and messaging for five user portals (TPA, advisor, plan sponsor, broker dealer, participant) plus print and online materials, including enrollment forms and Plan Establishment Guides. Private-label branding allows our strategic distribution partners to grow business through value-added services.

Contact us today for an online demo at [sales@aspireonline.com](mailto:sales@aspireonline.com)

Aspire is all about SMART choices—  
get **smart** with Aspire.

### Aspire—Delivering Smart Retirement Solutions

Aspire Financial Services, LLC is a leading service provider of smart retirement solutions. Serving the industry for over 12 years with a conflict-free, open-architecture retirement planning management system, Aspire offers the most extensive capabilities nationwide for all plan types [401(k), 403(b), 457, IRA, and Defined Benefit] and all retirement plan stakeholders. Aspire provides a best-in-class technology-enabled portfolio of pre-defined or highly customizable smart retirement solutions with private-label branding options through its proprietary technology platform and strategic partnerships. Aspire links the retirement planning community together to deliver smart solutions for any plan type independent of average account balance or plan size—enabling our partners and customers with strong economic value and competitive advantage through a cost-effective transparent pricing structure and fully built operational model. To learn more about Aspire's unique capabilities that deliver smart retirement solutions, visit [www.aspireonline.com](http://www.aspireonline.com) or call 866.634.5873.

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