

SMART RETIREMENT SOLUTIONS with InvestLink— Aspire's proprietary retirement recordkeeping platform



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

- a. One system to manage all plan types
- b. Flexible plan design with customization and private-label branding options for any size plan
- c. Competitive pricing structure
- d. Retirement readiness tools that help Plan Sponsors and Participants effectively manage and prepare for retirement
- e. Regulatory supported platform
- f. All of the above

The right answer is all of the above.

Aspire delivers retirement-centric technology capabilities through InvestLinkSM—a proprietary retirement recordkeeping platform that simplifies administration, streamlines operations and saves time by managing all plans through a single platform with flexible capabilities to build unique solution requirements.

The choice is yours with InvestLink.

- *Choose* to consolidate the number of vendors to manage your business
- *Choose* to work with online workflows for new plan conversions
- *Choose* to work within a flexible partnership arrangement (i.e., TPA, Custodian, Money Manager, Data Aggregator, Payroll Vendors, etc.)
- *Choose* to manage with global investment models
- *Choose* from over 25,000 investment options
- *Choose* to manage with a fee-based model
- *Choose* to reinvest revenue shares to ERISA plans
- *Choose* to implement private-label portal branding to a comprehensive digital and print framework
- *Choose* to build a compliant-driven solution



InvestLink is the technology platform of Aspire's recordkeeping and plan processing business—delivering one system to manage all plan types.

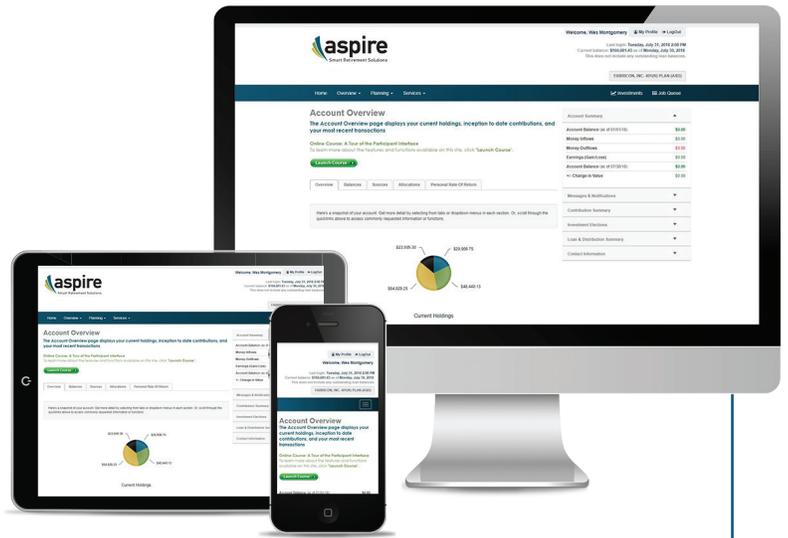
Why InvestLink is the platform of choice.

- Provides regulatory, compliant solutions that offer conflict-free options and partnerships, ensuring clients' best interests.
- Drives strong economic value and competitive advantage through a proprietary, open-investment, conflict-free, technology-enabled platform that links the retirement planning community with over 25,000 investment options.
- Facilitates best-of-breed strategic partnerships with best-in-class service providers.
- Designs technology-driven solutions enabling financial partners to help individual clients retire with dignity and quality of life.
- Offers retirement readiness tools and solutions to address the national coverage crisis.
- Addresses relevant business needs with a configurable platform providing flexibility, choice and customization.
- Embeds standards of excellence in flexible plan design, competitive pricing, a multi-level private-label branding program, model portfolio building with a highly scalable and customizable platform, ongoing comprehensive education and training, and a Client Care Team with a single-threaded service model that consistently delivers a superior client experience.
- Delivers cost-effective smart retirement solutions with transparent pricing.



InvestLink top benefits.

- Visually enhanced, easy-to-use navigation tools
- Distribution & Loan wizard (if applicable)
- eStatement capabilities, on-demand statement generation and optional weekly email statement summary
- Email confirmation sent upon transaction
- Educational tools and materials customized by life stages
- Multi-layered security protocols
- Manage your account from any device
- Global model management
- All plans—one platform

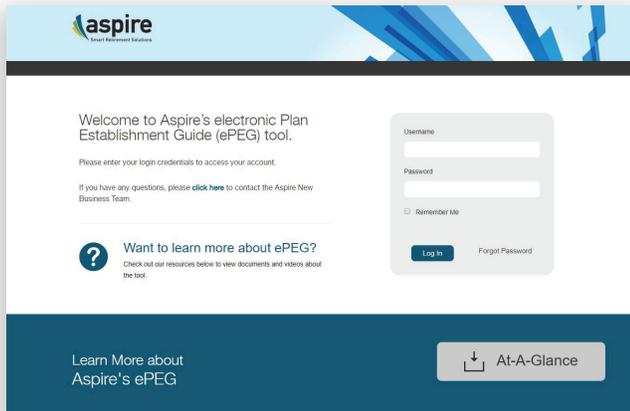


Streamlined document creation through InvestLink.

To make your onboarding experience easier, Aspire has designed ePEG—our electronic Plan Establishment Guide—an online data capture tool for ERISA Plan TPAs and advisors.

Aspire's ePEG:

- Streamlines the collection of all information necessary to onboard a plan
- Pre-populates repetitive plan information (plan name, contacts, etc.)
- Allows online approval for sponsors
- Provides easier process to answer questions with online help and guard rails to improve answer quality
- Delivers ability to store profiles for pre-population of standard fund lineups, models and payment methods



InvestLink—the strongest link to retirement readiness.

InvestLink helps advisors grow business, helps Plan Sponsors streamline plan management administration, and helps Participants prepare for retirement effectively—positively impacting the national retirement coverage crisis.

InvestLink delivers countless benefits. It is the solution to working across numerous vendor platforms. The new Participant portal offers a rewarding user experience. It provides simplicity and flexibility with access to thousands of investment options and a cost-effective, transparent pricing model. InvestLink is a retirement management platform designed for advisors, TPAs, plan sponsors, and participants in unique ways important to each role.

Aspire's high level of service is based on providing our clients with a single, dedicated point of contact and a commitment to continue to make significant investments to enhance InvestLink—with state-of-the-art tools and technology featuring the latest digital solutions providing the ability to spend more time on growing business and less time administering it, while working to enable greater outcomes for Participants and help Americans prepare for retirement.



Make the right choice with InvestLink—and Aspire.

For more information about InvestLink, contact your main Aspire account contact or visit www.aspireonline.com or call 866.634.5873.

Aspire—Delivering Smart Retirement Solutions

Aspire Financial Services, LLC is a leading service provider of smart retirement solutions, serving the industry since 2002 with a conflict-free, open-investment retirement planning management system supporting all plan types [401(k), 403(b), 457, IRA including Payroll Deduction, Cash Balance, Defined Benefit, Non-Qualified]. 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 enables strong economic value and competitive advantage through a cost-effective transparent pricing structure and fully built operational model. To learn more, visit www.aspireonline.com or call 866.634.5873.

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