

SMART is working with a company that anticipates—and delivers.

**SMART IS WORKING WITH ASPIRE.**



### SMART is who we are

Aspire is a company that delivers SMART retirement solutions. A company with a national footprint that is the leading service provider for all retirement plan types and sizes. A company that provides choices, flexibility and customization.

Aspire is a proactive company—setting the benchmark for the industry by setting standards. A company that put a fee disclosure program in place 10 years before mandated. A company that knows transparency is vital—and to be fair, fees shouldn't be tied to account balance or plan size. A company that was founded to operate in the best interests of clients—and still leading the way to alleviate the retirement coverage crisis.

Aspire is a company that empowers industry professionals by linking them with smart, results-driven tools that provide value and grow business. A company that protects participants from limited choices and hidden fees. A company that has years of experience managing retirement recordkeeping on a proprietary, open-investment, compliant-driven platform built to address changing fiduciary rules.

### SMART is serving all key stakeholders

First and foremost, we support our strategic distribution partners—TPAs, advisors, plan sponsors, broker dealers, money managers, custodians, and strategists—by automating processes, delivering the latest technology, providing branded solutions, communicating on all levels, and offering flexibility to make wise, cost-effective investment choices.

First and foremost, we are an advocate for retirement plan participants—ensuring access to all information, cost-effective transparent pricing, conflict-free investments and ongoing education for retirement readiness with tools from starting to save to reaching retirement.

We serve all stakeholders with the same high level of commitment—implementing the smartest retirement solutions to achieve goals across the board. It's a smart approach.

### SMART is what sets us apart

**Only Aspire** provides InvestLink<sup>SM</sup>—our smart open-investment platform that delivers dynamic account access and management, flexibility, transparency, and private-label branding options to maintain customer loyalty.

**Only Aspire** offers Definitive Disclosure<sup>SM</sup>—our smart industry-leading program that facilitates full fee disclosure reporting for all stakeholders.

**Only Aspire** delivers what our customers need—by continuing to invest in a best-of-breed retirement management platform that meets industry demands for a smart, more enriched experience—resulting in more technical and operational flexibility to enable customized, configurable models.

## SMART is good customer experience

At Aspire, our fundamental objective is helping participants retire with dignity by offering plan sponsors and participants access to cost-effective, conflict-free, compliant-driven retirement benefit programs. This single-minded focus also drives competitive advantage for advisors and TPAs.

Our enhanced, proprietary InvestLink technology platform delivers easy-to-use navigation tools, mobile capabilities, solid data analytics and reporting, educational tools by life stage, and self-service and processing automation—providing an end-to-end rewarding online experience, including an electronic Plan Establishment Guide (ePEG) to streamline onboarding, for advisors, TPAs, plan sponsors and participants—delivering smart retirement outcomes. InvestLink's features and functionalities provide consolidation across plans, reducing vendor management, and with one system for overall plan management—streamlining operations and saving time.

## SMART is know-how

Our experts offer decades of proven experience and knowledge in retirement plan administration and management, product development, and information technology—backed by our CEFEX Certification for Recordkeepers for adherence to industry best practices, annual SSAE 16 – SOC 1 Type II successful audit, and memberships in ASPPA, NAPA, NIPA, NTSAA, and NAGDA.



We implement best-in-class, smart industry standards to protect confidential client information, including data encryption and network monitoring. All records are backed up daily and archived, and all servers are located in a hosting facility with state-of-the-art, 24-hour systems to prevent unauthorized access.

## SMART Benefits of working with Aspire

- No-conflict, open-investment platform links to over 25,000 options
- Configurable platform with one system to manage all plan types
- Five private-label branding packages range from banner header to five-page microsite
- Business model always competitive and based on full fee disclosure & transparency
- Compliant with DOL and state fiduciary regulations
- Streamlined onboarding with electronic Plan Establishment Guide—ePEG
- Account management with single point-of-contact customer service support model
- Helpful tools to prepare and manage for retirement
- Smart solutions to reach retirement readiness

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

SMART is the new retirement—  
get smart with Aspire.



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### 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](http://www.aspireonline.com) or call 866.634.5873.

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