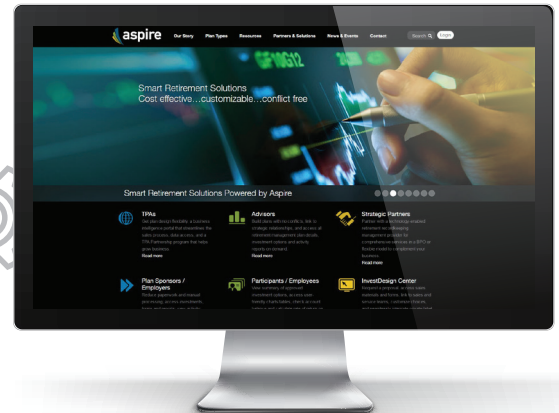
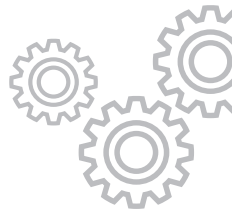


Aspire—the solution for retirement recordkeeping

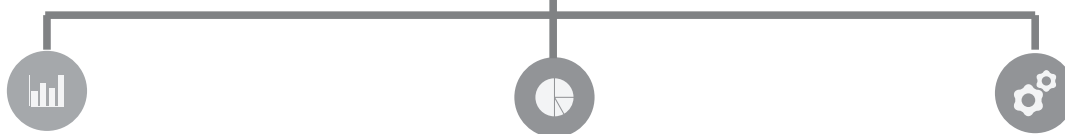
Delivering best-of-breed scalability and resources

Offering the recordkeeping solution that meets the growing needs of organizations, serving:

- 13,500 plans (all types)
- 325,000 participants
- Over \$18 billion in assets



Benefits of working with Aspire



Fiduciary-friendly platform

- Business model always based on full fee disclosure & transparency
- Company founded to operate in the best interests of clients
- Flexible retirement plan management
- Flat-fee competitive pricing model
- No-conflict, open-investment platform
- Transition from a commission fee structure to a fee-based model or flat fees with a level comp option
- Plan processing repapering support
- Revenue share administration

Plan migration and support

- Configurable platform with one system to manage all plan types
- Retirement management platform for BD/advisor/TPA
- Manage all aspects of retirement planning for plan sponsors and participants
- Integrated partner model with custodian, investment strategist/co-fiduciary, compliance communications providers, and data aggregation
- Account management and customer service support

InvestLinkSM recordkeeping

- Proprietary retirement recordkeeping platform linking to over 25,000 investment options, and leading custodians and strategists
- Online tools and transaction tracking and reporting
- Easy-to-use navigation
- Self-service and automation
- Mobile capabilities adjust to device size
- Educational tools by life stage
- Helpful tool to manage and prepare for retirement

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. 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. To learn more, visit www.aspireonline.com or call 866.634.5873.