CREATING A SECURE FINANCIAL FUTURE

Professional advice, personalized for you

MANAGED ADVICE®

Participating in your workplace retirement plan is a terrific first step in securing your financial future. But when it comes to building a comprehensive retirement strategy, many people recognize the value of professional help.

Your retirement plan offers *Managed Advice,* an easy-to-use, professionally managed service that can save you time and effort in building a sound retirement strategy. And we're here to help you along the way.

CUSTOMIZED RETIREMENT STRATEGY JUST FOR YOU

Managed Advice brings the pieces together to help you create a strong foundation for a successful retirement:

SIGNING UP TAKES A MATTER OF MINUTES

- The service is available through your existing retirement plan
- Access your account from any device and make adjustments to your strategy with a few clicks

65%

of workers would like more information and advice from their employers on how to reach their retirement goals.[1]

REASONABLE FEES

The fee is less than what you'd typically pay an independent financial advisor[2]. The fee is .45% annually, which comes to about .38 cents per month for every $1,000 in your account. First time subscribers may be eligible to try the service for free. For further information please log into your account.

Simplify your financial life. Get a personalized portfolio custom built for you, and view all pieces of your retirement strategy in one place with *Managed Advice.*

Connect with us:

Connect with us:

LOG IN to your account to explore *Managed Advice* and sign up

SCHEDULE appointment

CALL 844-622-2133

[1] "21st Annual Transamerica Retirement Survey of Workers," nonprofit Transamerica Center for Retirement Studies, 2021

[2] "Average Financial Advisor Fees," AdvisoryHQ, 2021

Important: The projections or other information generated by the engine regarding the likelihood of various investment outcomes are hypothetical, do not reflect actual investment results, and are not guarantees of future results. Results derived from the tool may vary with each use and over time. Please visit your plan website for more information regarding the criteria and methodology used, the engine's limitations and key assumptions, and other important information.

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