

SMART RETIREMENT SOLUTIONS for 403(b) and 457

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

- a. Open investment choices
- b. Cost-effective transparent pricing
- c. Online real-time access, communications, and collaboration
- d. 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 and school districts. A service provider who delivers choices. The right service provider is Aspire—an industry leader that simplifies plan administration and improves retirement benefits.

Freedom to choose

The retirement landscape is quickly evolving as 403(b)-eligible employers are seeking the investment flexibility and transparency commonly found only in 401(k)s. Aspire's open-architecture retirement management system is uniquely positioned to deliver the ultimate in flexibility and transparency at a competitive cost structure. All fees are disclosed.

For educators or officials who manage the plan, the platform is user friendly. The participant user portal provides access to viewing account balances, researching investment options, and printing statements.

You have the choice in picking the smart company that works best for you—a company that drives competitive advantage and enables greater outcomes.

Investment choices

Aspire's conflict-free open architecture retirement management system includes over 25,000 investment options including mutual funds collective trusts, and stable value funds. With your guidance, participants have the freedom to select any available investments offered, allowing access to the choices of brand-name investments and some fixed income products.

Plan search—an easier way

Aspire's Plan Search functionality is as easy as it gets. Select the state. Select the school district. And you're in. From there, it's just a click to getting plan details, accessing enrollment forms, finding who the TPA is, and reviewing investment options. There's also a Fund Search tool to search by ticker symbol or fund family. The Fund Search tool also gives you access to the latest Morningstar® fund information and the fund prospectus.

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.

The 403(b)/457 family of smart retirement solutions

Aspire delivers a full range of smart retirement solutions for all 403(b) plan types in addition to our K-12 solution. We offer solutions for Higher Education, Faith Based, Non-Profit, Healthcare, and ERISA 403(b) plans and 457 Government and Non-Profit plans with a deep understanding of the different participants, occupations and participant needs. Aspire's complete suite of 403(b) and 457 solutions are designed to deliver flexibility in making choices for our strategic distribution partners and plan participants.

Benefits of Aspire's smart retirement solutions for TPAs, advisors and plan sponsors:

- Aspire is approved to do business in over 3,500 school districts
- 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 for K-12
- Ability to partner with leading money managers and investment strategists
- Compensation received as commissions or in a fee-based structure
- Transparent pricing model

Contact us today for an online demo at 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 or call 866.634.5873.

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