

Alliance

**4 Powerful Ways  
an Independent  
Recordkeeper  
Transforms Your  
Retirement  
Plan Experience**



**Alliance Pension Consultants, LLC**

**Your Encouraging, Supportive, &  
Collaborative Partner**

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## Be Your Clients' Retirement Plan Superhero

### 4 Powerful Ways an Independent Recordkeeper Transforms Your Retirement Plan Experience

We do this by:

1. Collaborating closely with you and your clients to design and implement a plan that fits them.
2. Supporting a wide range of low-cost investments without proprietary requirements.
3. Giving you and your clients a premium quality experience.
4. Delivering highly cost-effective services.

#### | Alliance Pension Consultants helps you by:

- Maximizing the tax advantages & benefits available to owners and key stakeholders
- Delivering custom, high-touch service to employers and participants
- Offering investment diversity and flexibility to create a best-in-class lineup

| When choosing a provider, an independent recordkeeper like us will prioritize objectives that best serve you and your clients by offering expert services without conflicts of interest or investment product sales.

You deserve a partner that prioritizes employers' objectives to ease the burden on you and empower owners and their employees. **Take center stage to help them shape their future!**



### 1. Collaborating closely with you and your clients to design and implement a plan that fits them.



#### With Alliance, you and your clients receive:

- | A dedicated consultant who leads a team of skilled professionals, collaborating to design a rewarding retirement program.
- | Passionate, meticulous professionals who will keep you abreast of ongoing legal changes, advise on opportunities to make improvements and adapt as objectives evolve in the future.



**Here is the key:** We are dedicated to providing an optimal experience that will make our mutual clients happy. **Let us put our expertise to work for you!**

### 2. Supporting a wide range of low-cost investments without proprietary requirements.



Independence ensures transparency and a diverse selection of cost-effective investment choices.

- | Create your best-in-class lineup of mutual funds, CITs, and ETFs, free of proprietary requirements
- | Build model portfolios and custom allocations
- | Meet your fiduciary obligations with support from the Alliance team of experts

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## 3. Giving you and your clients a premium quality experience.

We deliver:

- | An exceptional experience that fosters active engagement.
- | Flexible, customized, and goal driven retirement plans.
- | **Plan success:** maximizing participation & empowering employees to make the most of their opportunity to secure a comfortable retirement.

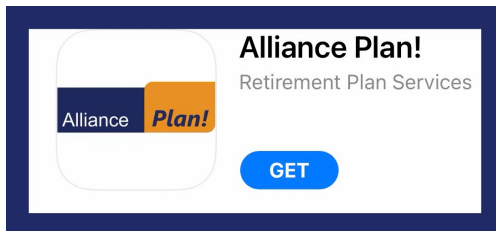


| **Key:** Alliance will work with advisors to provide an engaging experience to drive asset and account growth.



| We offer a modern, user-friendly interface that is accessible on mobile devices, complemented by financial education & wellness programs.

| These resources assist employees with eliminating debt, managing budgets, building emergency savings, & positioning themselves to save.



## 4. Delivering highly cost-effective services.



**We will prioritize bringing your clients premium value by:**

- | Protecting against excessive and hidden costs to ensure their savings potential in the long term.
- | Maximizing their tax-deferred and tax-deductible contributions.
- | Capitalizing on tax-advantaged retirement programs.
- | Providing exceptional service to reduce the burden on you and your clients.

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At Alliance, we will help you and your clients by:

- | Maximizing the tax advantages & benefits available to owners and key stakeholders
- | Delivering custom, high-touch service to employers and participants
- | Offering investment diversity and flexibility to create a best-in-class lineup



**Choose a partner who shares your clients' vision and goals. This is an excellent opportunity for your clients to save effectively. Reach out to us to optimize your clients' retirement plan today!**



**Be Your Clients'**  
**Retirement Plan Superhero**

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## Alliance Pension Consultants. Your Encouraging, Supportive, and Collaborative Partner.



## Discover More - Contact Your Partner Today!

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