



OPEN CHOICE

RETIREMENT

A photograph of a man and a young girl walking away from the camera on a sandy beach. The man is on the right, wearing a light blue t-shirt and dark shorts, holding the girl's hand. The girl is on the left, wearing a pink tank top and patterned shorts. They are walking through shallow waves. The background shows the ocean and a blue sky with light clouds.

**Build Your Future
With Open Architecture**

Call 330-867-6900

OpenChoiceRetirement.com



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RETIREMENT

Choose and Change Benefits Services Without Switching Your Plan

It's time to stop investing time and money into benefits administration. No one should be held hostage by a benefits plan that doesn't allow changes to third-party administrators, record-keepers, custodians or investment advisors.

In fact, it should be easy to access the investments, management and consultation you require, without the hassle of switching plans.

That's why we created **Open Choice**, the open architecture retirement fund that provides the flexibility and freedom your business needs to succeed.

Gain unprecedented access to thousands of investment options across top fund companies. Spend less time managing your benefits and more time managing your company. Not to mention, you get lower costs and better administrative performance.

Open Choice Works For You

- Benefits adapt to your business needs with an open architecture, full-service platform.
- Over 25,000 investment options from top firms and mutual funds.
- Third-party administrators, record-keepers, custodians and advisors trusted by thousands of corporations with over \$100 billion in client assets.
- Expert client service and 24/7 internet access for plan sponsors and participants.
- Quick and easy implementation thanks to our participant education and enrollment materials.
- Zero worry about paperwork: compliance testing, reporting and Form 5500 preparation.

Isn't it time for your plan to actually start benefiting your business?

Why Open Choice?

Traditional retirement plans lock you into your plan with administrators that are set in stone. If these administrators don't work for your business, there is nothing you can do except change plans.

Open Choice is different. It matches you with the best talent and solutions in the benefits service industry, without requiring significant time or financial investments.

Your employee benefits need to be in expert hands. The Open Choice team has built an open architecture solution that puts your company first.



- **Designed to benefit payroll companies.** Our seamless integration with payroll solutions and retirement plan systems means less time spent on administration, with better processing accuracy and tighter security.
- **We're retirement professionals.** We're at the forefront of the 401(k) industry and have created custom-made plans backed by world-class service. Our retirement solutions can help you recruit, reward and retain valued employees.
- **More options, better results.** We offer more than 25,000 investment options from the world's top investment firms and mutual funds.
- **We partner with the best.** Our partner firms that support third-party administration, record-keeping and custodial services work with thousands of corporations and plan participants, representing more than \$100 billion in client assets.



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Choose from Thousands of Investment Options

Open Choice provides unprecedented access to thousands of investment options from hundreds of top investment firms and mutual funds, including:



Vanguard



JANUS



OppenheimerFunds
The Right Way to Invest



PIMCO

BLACKROCK



American Century Investments

ALGER

DODGE & COX FUNDS



Evergreen Investments



IVY FUNDS



Open Choice Custodian Partners Include

Matrix Trust Company
Mid Atlantic Trust Company

Pershing, LLC
Schwab Bank

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