



# EDE A FI A CIA E GI E

We believe everyone deserves to move their financial life forward.

## H E A E

We're one of America's top independent wealth planning and workplace investment advisory firms, serving 1.3 million clients.

## HA E D

Our unique combination of high-tech and high-touch services helps our clients make better financial decisions during life's biggest moments.

## E HE C IE A H GHE E AGE F IFE

No matter where an individual is on their financial journey, our expert team, patented technology and full suite of services can help them transition from one financial moment to the next.



Through many of the nation's leading employers, we offer an integrated suite of personalized financial solutions to support employees and plan participants across their major life events and milestones – from their first paycheck all the way through retirement – which are the times they need help the most.

Financial Planning

Retirement Planning

Retirement Readiness

Life's Financial Moments

Investment Management

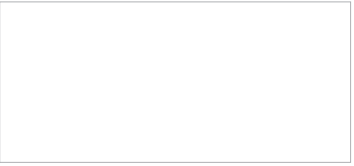
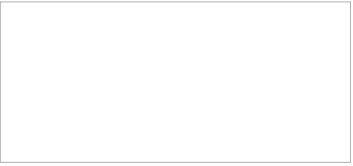
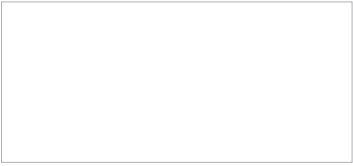
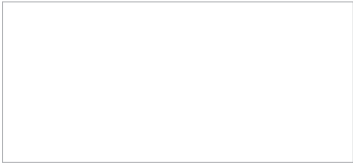
Estate Planning

Everyday Wealth and Wellness

Diverse Employee Needs

Insurance Guidance

Tax Planning



**\$271B**

Assets Under Management

**10.4** 

Plan Participants

**690+**

Plan Sponsors

**102**

FORTUNE 500 Plan  
Sponsor Clients

**#1** INDEPENDENT FINANCIAL ADVISORY FIRM