

Partner Logo

A Personalized Investment Glide Path for Every Employee



PREPARED FOR

<<Company Name>>

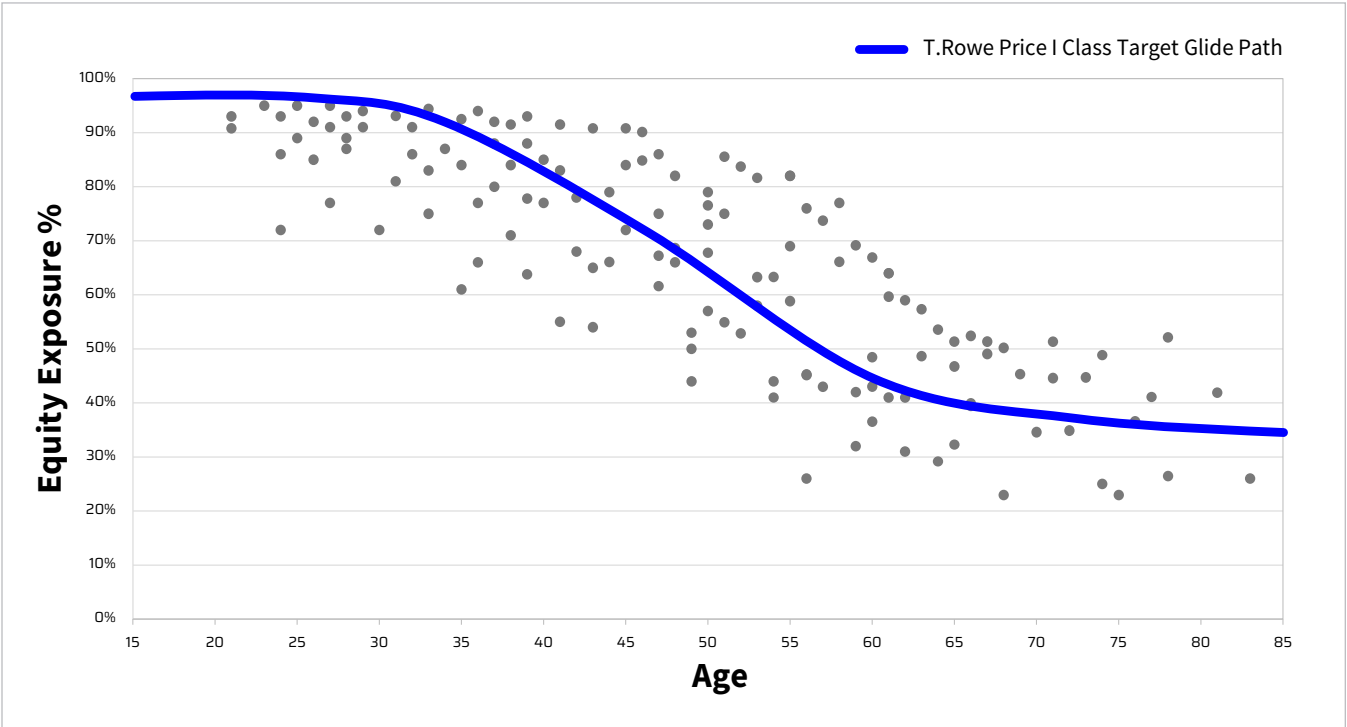
05.25.2023

PERSONALIZING INVESTMENT GLIDEPATHS

A personalized, goal-based investment experience starts with projecting how much retirement income each person is likely to need. This estimate considers many factors including a person’s age, income, retirement plan savings, outside savings, gender, state taxes, and more.

Unlike a single-factor Target Date Fund that assigns the same strategy and investment glide path to all investors the same age, iJoin [or replace with brand] creates a unique glide path for each investor.

This chart compares the projected investment glide path for each of your plan’s participants to that of a single factor Target Date Fund benchmark.



Please note this is merely an illustration and should not be construed as an investment recommendation or advice. Please consult your plan’s financial advisor or other investment professional.

Equity exposure plotted here reflects approximate allocations calculated based on the risk and allocation methodologies of plan’s selected or proposed investment manager, {Name of MAP partner}.

Risk Methodology

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Allocation Methodology

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DISCLOSURES

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