

Saving and Investing for Retirement.



Enroll with Aspire

Our goal is to provide the most advanced, cost-effective investment platform for participants in 403(b) plans. We strive to build relationships with participants through the delivery of unbiased, innovative 403(b) solutions with excellent service and technology to help you achieve your retirement goals.



Participant Benefits with Aspire

- Flexibility
- Investment Diversity
- Local Advisor Support
- Convenient Online Access

SMART PEOPLE MAKE SMART DECISIONS
THE SMART DECISION IS ASPIRE.

How to start today

1. Schedule an appointment with:

Todd Huebler

Tel: 608.328.1040

Email: todd.huebler@edwardjones.com

2. Enroll in the plan

Complete paperwork at www.aspire403b.com or with your Financial Advisor.

3. Plan for your future

Saving in your 403(b) will help you meet your retirement savings goals.

Client Services

866.634.5873 | M - F 8 a.m. - 8 p.m. ET | info@aspireonline.com

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SMART RETIREMENT SOLUTIONS for 403(b)



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. National Advisor Network
- ☒ e. All of the above

The right answer is to pick a service provider that delivers it all.

A service provider who customizes your requirements to successfully market to educators, school district officials, religious leaders, non-profit professionals, and healthcare workers. A service provider who delivers choices. The right service provider is Aspire—an industry leader who simplifies plan administration and improves retirement benefits.

Freedom to choose

Partnering with Aspire provides your clients with the flexibility and choice to meet their retirement plan goals. Aspire's open-architecture platform—InvestLinkSM—enables you to configure

the investment offering best suited to your clients' needs—linking to hundreds of investment options enabling the ultimate in flexibility and customization for plan design for our TPAs, advisors, sponsors and participants for both 403(b) ERISA and non-ERISA retirement plans. The choice is yours.

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 with all fees disclosed. For TPAs, advisors and plan managers, the platform is user friendly. For participants, the user portal provides access to viewing account balances, researching investment options, and printing statements.

Flexible fund and payment design

With advisor guidance, participants have the freedom to select any available investment offered. Through Aspire's Fund Search tool investments can be selected by ticker symbol or fund family. Investment Lookup offers direct access to the latest Morningstar® fund information and the fund prospectus. Advisors can work with the participant to determine the pay rate and payment method. Compensation can be received as commissions or fee based.

Plan search for school districts

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.

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 full-service outsourcing provider of smart retirement solutions, we put our heads together and collaborate on what we think will work best.

The 403(b) Advisor Network

Aspire is committed to providing our partners with smart tools to build more and deeper client and peer relationships. Our 403(b) Advisor Network launched in the marketplace in Fall 2013 as an enhancement to our "Find a Financial Advisor" website listing. The new program provides peer collaboration and marketing support for select advisors who meet qualifications.

Benefits of Aspire's smart retirement solutions through online access:

- 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
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