LEAFHOUSE FINANCIAL | ijoin

Managed Account Program

You are unique.
Your portfolio should be, too.

A TAILORED APPROACH TO YOUR RETIREMENT

LeafHouse Financial makes it easy to invest. By using your plan's fund lineup, LeafHouse integrates technology and industry knowledge to provide an investment design that is personalized to your situation. Ongoing monitoring of your account helps to ensure that your investments stay tailored to your circumstances. When your situation changes, we reallocate.

LeafHouse-iJoin MAP

WE START BY GETTING TO KNOW YOU

LeafHouse uses industry data, proprietary technology, and your individual information (provided by you and your employer) to build an investment strategy specifically designed to help you reach your unique retirement destination.

FOR ILLUSTRATION PURPOSES ONLY

PERSONALIZED

We develop an investment strategy tailored to your needs and goals.

SIMPLIFIED

You don't have to be an investment professional; we do the work for you. This may help you feel confident that you're on track to meet your goals.

COMPREHENSIVE

We'll look at your full financial picture to help ensure you have a plan that addresses your personal saving, investing, and retirement income needs.

You receive ongoing direction.

Your retirement strategy is professionally managed, undergoes ongoing reviews, and can adjust with you as your personal financial situation changes.

You can receive professional support through education when it comes to making important savings, investing and retirement income decisions.

LeafHouse-iJoin MAP

Build a better future through a customized investment path

SAVINGS

50%

Higher Savings Rate [1]

Based on 6% deferral rate for a managed account user vs. 4% for target date fund investors.

INVESTMENTS

63%

More Consistent Returns[2]

Less variation in returns for managed account users vs. do-it-yourself investors.

INCOME

23%

More Income In Retirement[3]

Estimated income in retirement compared to standard withdrawal strategy of 4% (adjusted for inflation).

GET STARTED NOW

Use the iJoin portal to engage LeafHouse in developing your personalized retirement strategy today.

There is no guarantee provided by any party that participation in any of the LeafHouse Investment Services will result in a profit.

LeafHouse-iJoin MAP

1 Morningstar Investment Management. The Impact of the Default Investment Decision on Participant Deferral Rates: Managed Accounts vs. Target Date Funds, 2016.

2 Advised Assets Group, LLC (AAG), Internal Rate of Return (IROR) All Segments Study, 2017. The participant return distribution included in this study is used to illustrate the difference between those participants within the 90th percentile and the 10th percentile to preserve statistical integrity of the data reported. Refer to the study, which is available through AAG, for additional disclosures and methodologies.

3 Morningstar Investment Management, LLC, Alpha, Beta, and Now… Gamma, August 28, 2013. LeafHouse Disclosure Statement