

RETIREMENT SOLUTIONS

YOUR COMPLETE RETIREMENT PLAN SOLUTION

KTRADE is Committed to Serving Investment Advisors

At KTRADE, we understand the important role Advisors play in helping employees achieve a secure retirement. We are more than just another recordkeeper, we're a partner. Our services are designed to ensure that Investment Advisors can perform optimally. We place no restriction on the investment solutions that can be offered to you, nor do we have any proprietary investments, which means Advisors are free to deliver to your employees the investment solutions they believe are best suited for them. We excel at collaboration, offering the tools and expertise Advisors need.

Why Advisors Choose KTRADE:

Security, Innovation and Great Value

- ✓ Price Competitive Recordkeeping - our fees are among the lowest in the industry and this approach translates into higher net returns and higher balances for employees.
- ✓ Secure and Reliable Technology - we utilize SunGard's industry-leading, state of the art technology to deliver innovative and high quality solutions that keep information secure at all times.
- ✓ Flexibility and Independence - we place no restrictions on the investment solutions that can be offered - you are free to deliver the investment solutions best suited to employees.
- ✓ Trust and Transparency - we take seriously our promise to fully disclose all our fees.
- ✓ Reporting and participant access - is of critical importance to any defined contribution plan. Plan participants can obtain the most accurate and timely views of their account, update information, and perform a variety of account transactions.
- ✓ Dedicated Advisor Website - as a plan advisor, you have access to a website that supports ongoing client management, access to individual participant information and plan level reports.

Our strategic partners include the following industry leading Custodians:

Charles Schwab Trust Company

Fidelity Investments

Mid Atlantic Trust Company

TD Ameritrade

Matrix Financial Solutions

allowing us to provide a variety of safe and secure options for custodial and trustee services.



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