



**YOUR COMPLETE RETIREMENT
PLAN SOLUTION**

WHO WE ARE

KTRADE is a pure open architecture, CEFEX Certified recordkeeping company that serves the retirement plan industry through Investment Advisors and our Alliance Members, a national network of Third Party Administrators (TPAs), regionally located

throughout the United States. At KTRADE, the founding principal that drives our business is the belief that now, more than ever, employees depend on the investment plan offered by their employer to see them through their retirement years. We know

that the ultimate test for any self-directed retirement plan is what it produces at retirement. The KTRADE Alliance is the key to empowering your plan to maximize its outcomes.

In collaboration with our business partners, KTRADE crafts retirement plan solutions to fit your unique business and your employees' needs. It's what we do. It's all we do. This singular goal allows us to stay focused on what matters most - helping you and your employees plan, prepare and execute a sound path to financial retirement security. We look forward to becoming your trusted retirement plan partner.

What We Do



Why 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 Systems' industry-leading, state of the art technology to deliver innovative and high quality solutions that keep information secure at all times and enable employees to make the most of their retirement accounts.
- ✓ **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.



“ Our strategic partners include the following industry leading Custodians: Charles Schwab Trust Company, Fidelity Investments, Mid Atlantic Trust Company, TD Ameritrade and Matrix Financial Solutions allowing us to provide a variety of safe and secure options for custodial and trustee services. ”

KTRADE is Committed to:



SERVING PLAN SPONSORS

The KTRADE team can provide the guidance your fiduciaries and participants need to achieve success. This team consists of KTRADE's recordkeeping service, a leading custodian, your Investment Advisor and the local KTRADE Alliance Member TPA. In today's retirement plan environment, our role as recordkeeper is especially critical and is the backbone of the participant-directed system in place today.



SERVING YOUR INVESTMENT ADVISOR

We excel at collaboration, offering the tools and expertise your Advisor needs. We place no restrictions on the investment solutions that can be offered to you, nor do we have any proprietary investments, which means your Advisor is free to deliver to your employees the investment solutions they believe are best suited for them. Advisors also have access to a state-of-the art, dedicated website portal that supports ongoing client management, access to individual participant information and plan level reports. Additionally, we provide professional enrollment kits and access to investment analysis and benchmarking tools.



WORKING WITH PLAN PARTICIPANTS

We know how important it is to be financially prepared for retirement. That's why we offer investment options and pricing designed to maximize the financial security of your employees. Through our robust, user-friendly website, we offer a library of financial-planning calculators and other tools to help employees plan for a financially secure retirement. Additionally, our TPAs and Investment Advisors provide years of experience helping employees to achieve sound retirement outcomes. Direct assistance is also provided via toll free phone service and email.

The KTRADE Mission

Our mission is to provide a high quality, secure and reliable system that is available to you and your employees 24 hours a day, 7 days a week. We are committed to providing excellent service as we help guide you and your employees on a well-designed path to retirement security.





Recordkeeping Services
Certification



1500 North Oak Drive
Suite B
Plymouth, IN 46563



888-954-9321



KTRADEonline.com