

Services

CORE RETIREMENT ACCOUNT MANAGEMENT

- **Fidelity**
- **Security Benefit Life 401(k)**
- **Security Benefit Life 403(b)**
- **TIAA***

Core retirement account management is for 401(k), 403(b), or 457 accounts that don't offer the Self Directed Brokerage Account (SDBA) option. We accept full fiduciary responsibility for managing accounts and provide a legal safe harbor as defined by the applicable sections of the ERISA federal retirement law and the Internal Revenue Service Code.

We offer five retirement account management strategies (see back) which are optimizations of the core offerings of the plan. All options use diversified asset allocation strategies to control risk without inhibiting investment flexibility. The client along with the representative determine the appropriate strategy based on goals, objectives, risk tolerance, needs and time frame of the participant.

Our retirement account management is ideal for a wide range of clients. Designed for both a participant who is just beginning to save for retirement as well as a participant with an established account who is preparing to retire.

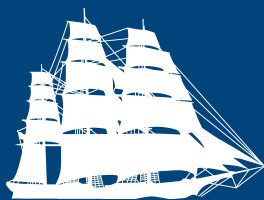
PRIMARY BENEFITS

Full acceptance of fiduciary responsibility

Optimization of Core choices

Relationships with largest retirement plan providers

Risk management optimization



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CORE RETIREMENT ACCOUNT STRATEGIES



Conservative

For the investor seeking stability. The primary goal of this strategy is capital preservation, with capital appreciation being secondary. It has a low level of risk/volatility.

Moderately Conservative

For the investor seeking capital appreciation and preservation. The primary goal of this strategy is long-term capital appreciation, with income being secondary. It has a low level of risk/volatility.

Asset Allocation**

For the conservative investor seeking capital appreciation and current income. The primary goal of this strategy is long-term capital appreciation, with some emphasis on current income. It has a moderate level of risk/volatility.

Strategic Equity**

For the investor seeking capital appreciation through equities. The primary goal of this strategy is long-term capital appreciation. It has a moderately high level of risk/volatility.

Global**

For the aggressive investor seeking long-term capital appreciation. The emphasis of this strategy is on long-term capital appreciation. It has a high level of risk/volatility.

Investing in any securities involves a risk of loss. Not all custodians permit for fee deduction.

*TIAA: Due to sub-account limitations, we are able to offer Asset Allocation and Strategic Equity only.

** Asset Allocation Portfolio was referred to as Moderate Portfolio previous to April 1, 2017
Strategic Equity Portfolio was referred to as Moderately Aggressive Portfolio previous to April 1, 2017
Global Retirement Portfolio was referred to as Aggressive Retirement Portfolio previous to April 1, 2017



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