

Advice Plus

investment advice for your retirement plan participants



AdvicePlus provides plan participants with investment advice—and satisfies a frequently heard participant request for help. With information from our record keeping system and supplemental information entered by your participants, AdvicePlus:

1. Educates the participant with respect to his/her investment options.
2. Recommends specific asset class allocations.
3. Suggests mutual funds within those asset classes and the amount to be invested in each.
4. Records participant investment choices and updates the record keeping system.

participant benefits

- Objective investment advice from a proven source.
- Advice obtained two different ways:
 - The First Look option provides “instant results.” Investment recommendations can be secured with only a few clicks of a mouse.
 - Develop a personalized strategy by adding details about your income and outside investments. Investment recommendations based on your information and implementation of a personalized action plan.
- Participants can receive investment and retirement planning education, including fund data sheets, online prospectuses, and interactive education modules.
- Additional financial calculators available for participant use.

sponsor benefits

- Improves participant satisfaction by providing specific investment recommendations.
- The advisor assumes fiduciary responsibility for the advice recommendations.
- Implementation is easy—simply announce the availability of AdvicePlus to your plan participants.
- Helps satisfy fiduciary requirements pertaining to participant education.

To view AdvicePlus simply log into the Alerus Retirement Solutions website. Log in as a participant with the User ID **ADVICE** and Password **1119**. If prompted to answer a security question, enter **demo** in lowercase, then click the Continue button. Click on the AdvicePlus button in the upper right corner (just below the Alerus Retirement Solutions logo).

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