



EQUITABLE

Equitable Retirement Vision®  
Personalized guidance

# Managed accounts

Through **Equitable Retirement Vision®**, you can give your employees the flexibility and professional support of StoryLine, Stadion's managed account service, which provides the investment structure and guidance on an ongoing basis.

A managed account includes professional advice across a multitude of integrated investment options to promote a positive retirement income. It is not a one-size-fits-all solution. A managed account considers not only the employee's age, but other factors, such as their attitude toward risk, to determine the best way to invest an employee's assets.

## Who is it for?

For employees seeking professional advice from an experienced managed account provider, Stadion.

## How does it work?

StoryLine goes beyond simple asset allocation. It is a comprehensive investment service that is personalized for your employees. It takes retirement planning a step further by combining their employee information with risk tolerance to deliver a customized and suitable allocation tailored to them.

## A managed account can provide:



An attractive retirement plan feature for employees who would benefit from a personalized managed account option.



A centralized document repository is tailored to the individual plan level for easy access to plan-specific documents and forms.



Access to plan reports provides aggregate results from quizzes and curriculum modules.



Reports summarizing key findings, detailed analytics and actionable insights, so you can benchmark your plan to similar plans.

## A managed account can provide your employees with:



### Expertise

From an experienced provider.



### Enrollment meeting support

If requested, a managed account representative will attend in-person or virtual enrollment meetings and provide continuing guidance and support.



### Call center availability

Access to a U.S.-based call center.



### A communications program

With the option to receive ongoing communications created to offer simple, actionable steps, employees can take on their journey toward achieving their retirement goals.

# Equitable Retirement Vision®

We focus on you, so you can focus on what matters.



## Effortless management

We handle plan implementation and operations, so you can focus on your business.



## Fiduciary guidance

Options for plan administrative and/or investment decisions to be managed by independent third-party fiduciaries.



## Option for retirement certainty<sup>1</sup>

For participants seeking to protect their assets from market volatility and receive steadier returns.



## Personalized guidance

A simplified online experience for participants at all life stages to achieve the future they've envisioned.

For more information on our retirement plan services, please contact your local financial professional or visit [equitable.com/retirement](https://equitable.com/retirement).

<sup>1</sup> **Retirement certainty** specifically refers to the Equitable Fixed Account<sup>SM</sup> and does not include the wide variety of mutual funds available in the Equitable Retirement Vision® defined contribution plan, which are subject to market risk, including loss of principal.

\*Stadion is not owned or affiliated with Equitable Financial Life Insurance Company or its affiliates.

**Mutual funds are sold by prospectus only. Be sure to review the current prospectus that contains complete information on charges, risks, expenses and investment objectives before investing or sending money. Contact your financial professional or the company for a prospectus.**

The Equitable Retirement Vision® defined contribution program consists of a custodial account offered through Benefit Trust Company, within which plan participants' chosen mutual fund shares are held, as well as a group fixed annuity contract (generic form number 2016FA-MFrev, 2016FA-MF403b) issued by Equitable Financial Life Insurance Company (Equitable Financial) (NY, NY). The Equitable Retirement Vision® defined contribution program is distributed by Equitable Distributors, LLC (Equitable Distributors) (NY, NY). Equitable Financial is solely responsible for meeting the obligations of the group fixed annuity contract.

Offered by affiliated and unaffiliated entities, the program is the result of various strategic partnerships, including one between Equitable Distributors, LLC and PlanConnect, LLC. The Equitable Retirement Plan Services<sup>SM</sup> platform includes recordkeeping, trading and custodial services to plan sponsors for the program. Benefit Trust Company serves as custodian of mutual funds selected by plan participants. PlanConnect, LLC serves as the platform's recordkeeper.

Equitable Retirement Plan Services<sup>SM</sup> and Equitable Retirement Vision® are service marks of the contractual arrangements between affiliated and/or unaffiliated entities within the platform; PlanConnect® is a registered service mark of PlanConnect, LLC (100 Madison Street, Syracuse, NY 13202. (800) 923-6669). Equitable Financial, Equitable Distributors and PlanConnect, LLC are separate, but affiliated companies. Benefit Trust Company is a separate and unaffiliated company.

The investments in this program are subject to investment risks, including possible loss of the principal invested. They are not insured by the Federal Deposit Insurance Corporation nor are they deposits to, obligations of, or guaranteed by any bank.

Equitable is the brand name of the retirement and protection subsidiaries of Equitable Holdings, Inc., including Equitable Financial Life Insurance Company (NY, NY); Equitable Financial Life Insurance Company of America, an AZ stock company with an administrative office located in Charlotte, NC; and Equitable Distributors, LLC. Equitable Advisors is the brand name of Equitable Advisors, LLC (member FINRA, SIPC) (Equitable Financial Advisors in MI & TN).

Annuities and Mutual Funds: • Are Not a Deposit of Any Bank • Are Not FDIC Insured • Are Not Insured by Any Federal Government Agency  
• Are Not Guaranteed by Any Bank or Savings Association • May Go Down in Value

Equitable Financial Life Insurance Company (NY, NY)

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