



EQUITABLE

401(k) managed accounts

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 employee information with risk tolerance to deliver a customized and suitable allocation tailored to them.

With Equitable Financial, 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 for 401(k) plan participants.

A managed account includes professional advice utilizing the plan's available investment options to promote positive retirement outcomes. 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.

Key plan sponsor features



Provides a customized investment strategy option for your participants to help achieve better retirement outcomes.



Stadion assumes the risk and responsibility associated with making investment decisions in employee accounts.



Easy access to reporting through a centralized repository, including plan benchmarking, actionable insights and tailored, plan-specific documents.

Key participant features



Personalized investment portfolios based on individual risk tolerance and holistic financial profile.



Access to in-person or virtual enrollment support, and ongoing guidance from Stadion call center representatives and online resources.



Professional account management services available at an institutional cost.



Stadion's Storyline provides a seamless process for ongoing investment allocations and underlying investment option selection.

For more information on our investment plan services, please contact your local financial professional or call our Sales Desk at (866) 401-3030, Option 1.

Important note

We believe education is a key step toward addressing your financial goals, and we've designed this material to serve simply as an informational and educational resource. Accordingly, this brochure does not offer or constitute investment advice, and makes no direct or indirect recommendation of any particular product or of the appropriateness of any particular investment-related option. Your needs, goals and circumstances are unique, and they require the individualized attention of your financial professional.

Group retirement plans may be sold via prospectus and/or may have investment options that are sold via prospectus. 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 current prospectus.

Equitable Financial and its affiliates do not offer tax or legal advice and are not affiliated with Stadion.

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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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