

Pontera Held Away Account Management



More Accurate Planning

Asset Location Implementation

Comprehensive Account Management

Do you have a 401(k), 403(b), Annuity, HSA, or maybe a 529 education savings plan?

For most clients, their 401(k) is their largest and most important retirement vehicle. Traditionally, these held away assets, and the others listed above, did not receive the care and attention they deserved. Now, with the Pontera Platform, I am able to **view, manage, and trade** your held away accounts, just like the rest of your investable accounts that I manage. By consolidating all your accounts with one trusted advisor, you receive the benefits of a holistic, professionally managed and rebalanced plan and portfolio. You also receive a more comprehensive reporting of returns and portfolio history.

Let's get started with Pontera today.



Studies show that professional managed accounts outperform non-managed accounts by 3.32%, net of fees. For a 45-year-old participant, this could translate to 79% more wealth at age 65. In the example above that results in a \$401,531 net benefit to the client.

(Data from Aon Hewitt report: Help in Defined Contribution Plans)