

Pontera Name Change: Frequently Asked Questions

What is Pontera?

Pontera is the new name for FeeX, a platform that enables your financial advisor to manage your held away accounts, such as 401(k)s, 403(b)s and more.

With Pontera, financial advisors can manage these accounts just like they do the rest of your assets.

Why did you choose the name Pontera?

Pontera comes from the Latin word for “bridge” (pont). The name reflects the company’s aspiration to be the bridge that helps millions of people reach their retirement goals.

What does this mean for me?

There is no action needed on your part. While Pontera’s name, look and feel is changing, we’ll still provide the same platform and level of service that we always have.

What are the benefits of having my advisor manage my held away assets?

Historically, financial advisors have not been able to provide the same level of service on held away accounts as they do their clients’ other accounts. Pontera enables financial advisors to manage held away accounts just like they do other accounts, which means that all of your assets can now benefit from professional management.

By using Pontera, your advisor can provide you with a higher level of service because he or she can monitor and manage all of your accounts holistically. For investors, this not only means less stress and more peace of mind, but also potentially more savings in retirement. Third-party studies show that professionally managed retirement accounts can outperform self-directed accounts by more than 3% per year, net of fees.¹ Over a 20 year time period, that can mean as much as 75% more wealth set aside for your retirement.