



StoryLine®, a personalized investment service

Founded in 1993, Stadion is a managed account provider focused on helping participants prepare for retirement. We believe a one-size-fits-all investment approach does not account for the differences of each individual, which could impact participants being prepared for retirement. StoryLine is a comprehensive investment service designed to improve participant outcomes through personalization.

StoryLine key features

- Stadion uses multiple data points from the recordkeeper to create personalized participant allocations. Participants can further customize through engagement.
- Allocations are constructed using the plan's investment lineup or with Collective Investment Trusts (CITs).
- Stadion's investment team continuously monitors participant accounts and adjusts allocations as needed.

Plan sponsors benefits

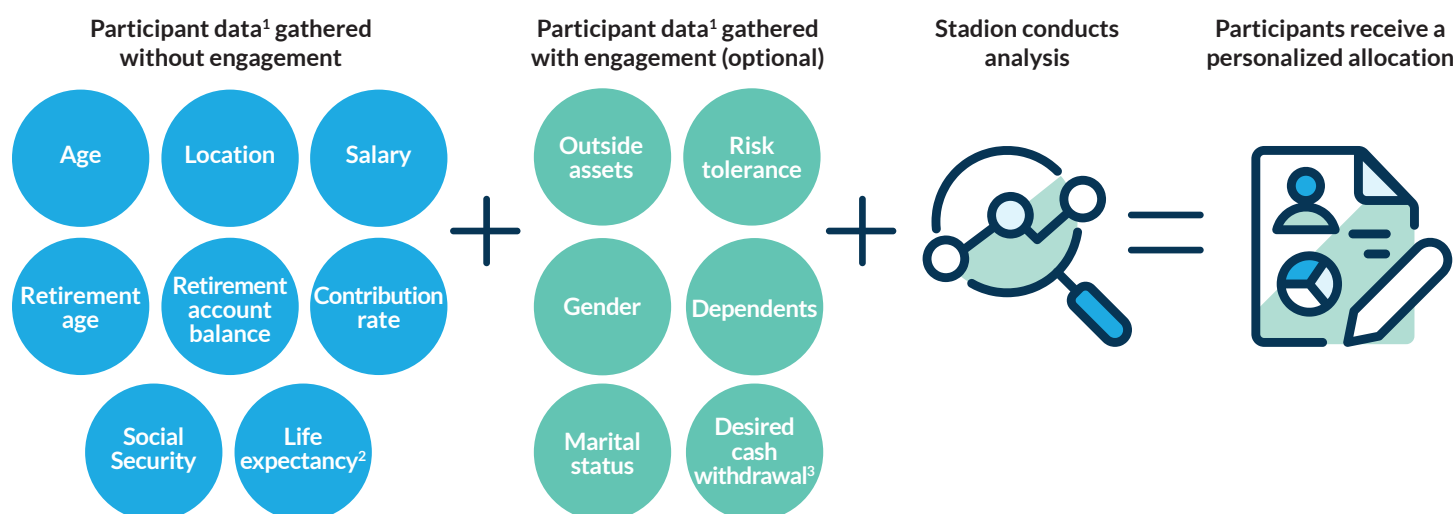
- Enhances the plan sponsor's benefit package by offering participants professional account management
- No cost to the plan sponsor
- Fiduciary protection when offered as QDIA

Plan participant benefits

- Personalized retirement account that is professionally managed to and through retirement
- Simple enrollment process and ongoing support
- Retirement income planning tool

Path to personalization

Below is an example of how Stadion creates personalized allocations.



¹ The list represents examples of participant data inputs. Stadion may consider using any input(s) referenced, as well as inputs that are not listed. Actual data used may vary based on the recordkeeper and participant.

² Life expectancy is derived using state and gender specific data derived from current CDC Life tables plus one standard error (standard deviation) to account for longevity risk.

³ Desired cash withdrawal is a participant input based on a post-retirement, periodic withdrawal from their retirement plan account. The desired withdrawal amount may not be attainable based on factors such as time horizon, account balance, investment performance, and availability of suitable investment allocations. The frequency of the desired withdrawal may not be available based on the design of a plan's distribution features.

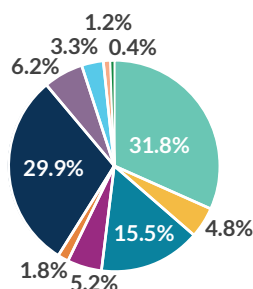
Constructing personalized allocations

Stadion believes it is important to understand each participant's story. Two participants may be the same age, but Stadion's approach ensures each is treated as an individual, not combined into a single allocation like a traditional target date fund.

	Ted	Amelia
Participant data¹		
Age	53	53
Retirement age	67	67
Life expectancy	87	90
Location	Florida	New York
Retirement account balance	\$203k	\$350k
Salary	\$65k	\$145k
Outside assets	\$47k	\$190k
Contribution rate	9%	3%
Resulting allocation²		
Equity	58%	72%
Fixed income	42%	28%



Ted



Equity

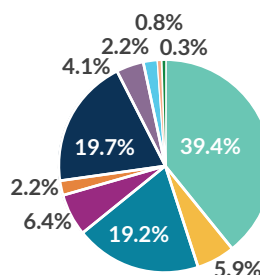
- Large Cap
- Small / Mid Cap
- Developed International
- Emerging International
- REITs

Fixed Income

- Aggregate Bonds
- International Bonds
- High Yield
- TIPS
- Cash



Amelia



Participant engagement and support

Our approach is designed to support participants and help them remain on track while they work towards their personal retirement goals.



Support during enrollment

Stadion supports financial professionals during the enrollment process and can conduct one-on-one meetings with participants.



Participant call center

When participants have questions, they can call our U.S.-based call center.

More Information:

For more information about how Stadion's StoryLine managed account can deliver more value to your clients, please contact your Stadion Representative or contact us by email at advisorsupport@stadionmoney.com.



stadionmoney.com • 800.222.7636 • support@stadionmoney.com



SMM-2510-32

1 The table represents examples of participant data inputs. Stadion may consider using any input(s) referenced, as well as inputs that are not listed. Actual data used may vary based on the recordkeeper and participant.

2 The sample portfolio allocations are not indicative of actual Stadion managed account allocations. Not every account will have these exact characteristics. This information is for illustrative purposes. Each managed account portfolio is tailored to meet its specific objectives and restrictions.

There is no guarantee of the future performance of any Stadion account. Material has been derived from sources considered to be reliable, but the accuracy and completeness cannot be guaranteed. Stadion Money Management, LLC ("Stadion") is an investment adviser registered with the U.S. Securities and Exchange Commission. Registration does not imply a certain level of skill or training. More information about Stadion's investment advisory services can be found in its Form ADV Part 2, which is available upon request.

©2025 Stadion Money Management, LLC. All rights reserved. Stadion and the Stadion S are registered service marks of Stadion Money Management, LLC. StoryLine is a service mark of Stadion Money Management, LLC.