

# StoryLine

Personalized investment service helping participants prepare for retirement

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 monitors participant accounts daily and adjusts allocations as needed.

### Plan Sponsors Benefits

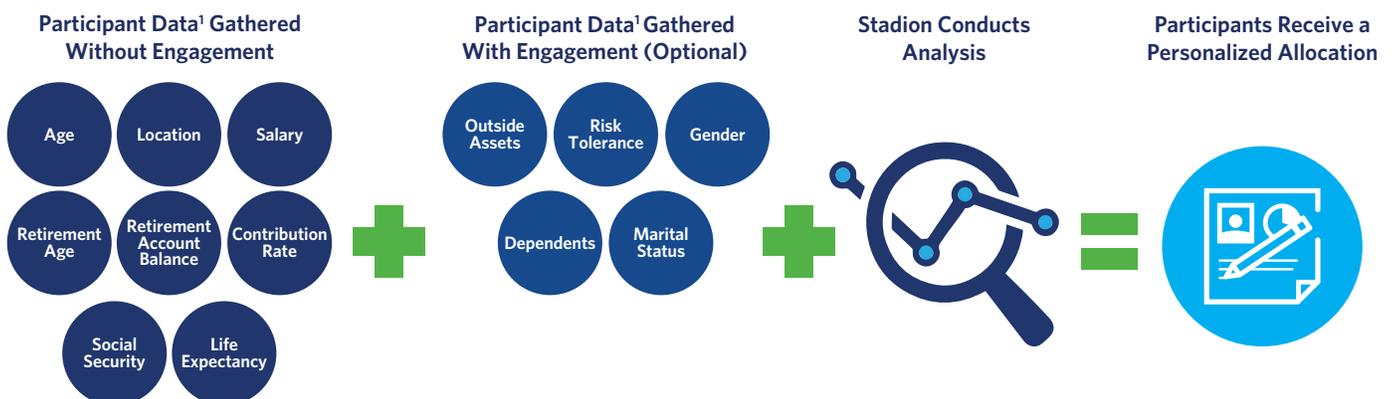
- Enhances the plan sponsor's benefit package by offering participants professional account management
- No cost to the plan sponsor
- Fiduciary protection when offered as QDIA

### Plan Participant Benefits

- Personalized retirement portfolio
- Simple enrollment process and ongoing support
- Retirement account is professionally managed

## Path to Personalization

Below is an example of how Stadion creates personalized allocations.

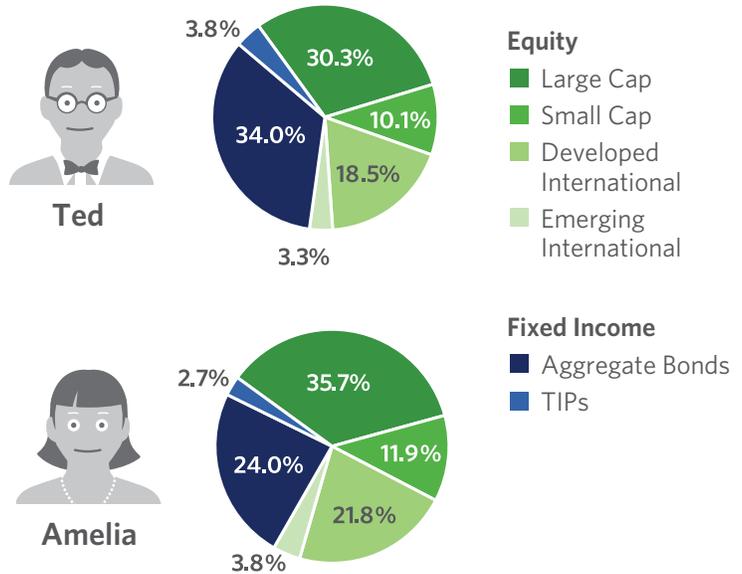


<sup>1</sup> The list represents examples of participant data inputs. Stadion may consider using any input(s) referenced, as well as inputs that are not listed. Actual data used may vary based on the recordkeeper and participant.

# 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
<b>Participant Data<sup>1</sup></b>		
Age	53	53
Retirement Age	67	67
Life Expectancy	81	81
Location	Florida	New York
Retirement Account Balance	\$223k	\$375k
Salary	\$81k	\$145k
Outside Assets	\$67k	\$125k
Contribution Rate	8%	3%
<b>Resulting Allocation<sup>2</sup></b>		
Equity	62.2%	73.3%
Fixed Income	37.8%	26.7%



## 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.



### Ongoing Participant Communications Program

Participants may elect to receive quarterly communications designed to provide simple, actionable steps to help achieve retirement readiness.

### 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](mailto:advisorsupport@stadionmoney.com).

<sup>1</sup> 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.

<sup>2</sup> 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.

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