



JOIN US TODAY

Create a stronger retirement benefit for your employees.

The ADVIS Multiple Employer Plan (MEP) can maximize your retirement plan—and better manage your budget, resources and administration.

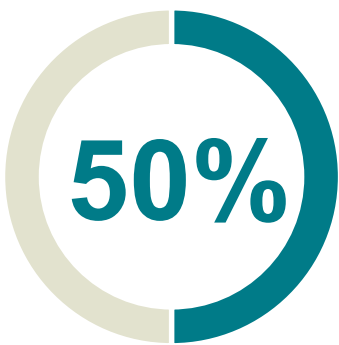


More members, more benefits and more power.

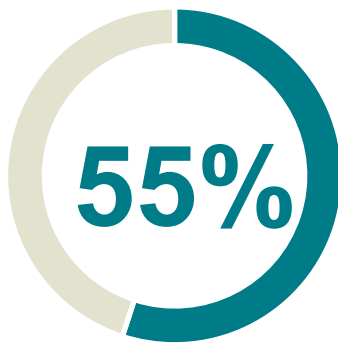
A competitive retirement plan is a crucial part of your benefits package, but it can be difficult to handle the plan cost, administrative labor and fiduciary exposure. The demands on your time can range from keeping up with the tasks of maintaining plan compliance and managing costs to selecting and monitoring the funds in the investment menu.

With the ADVIS MEP, you can tackle all these challenges by teaming up with other employers to deliver retirement plan services.

You're not alone in considering a MEP—it appeals to employers for various reasons:



say it's the reduction in the administrative burden¹



say it's potentially lower plan costs²



say it's to free up resources for other employee benefits¹

Join forces for better value.

Together, the ADVIS MEP members gain a breadth of services, because they're banding together with other employers to provide a robust retirement offering while sharing the cost and administration of the plan.

Administer easily.

Nearly all of your plan administration burden is eliminated now that the functions and liability of the 403(b) administrator are outsourced.

Stay protected and reduce fiduciary risk.

Fiduciary liability is significantly reduced now that experienced professionals act as your plan fiduciaries. Tasks and oversight required to keep your plan compliant are outsourced to an ERISA 3(16) plan administrator.

Get individualized plan design flexibility.

Prominent and well-known partners act as the ERISA 3(38) Investment manager and Registered Investment Adviser, the ERISA 402(a) named fiduciary, and the ERISA 3(16) plan administrator, with TIAA as the plan recordkeeper.

Achieve cost efficiencies with pooled resources.

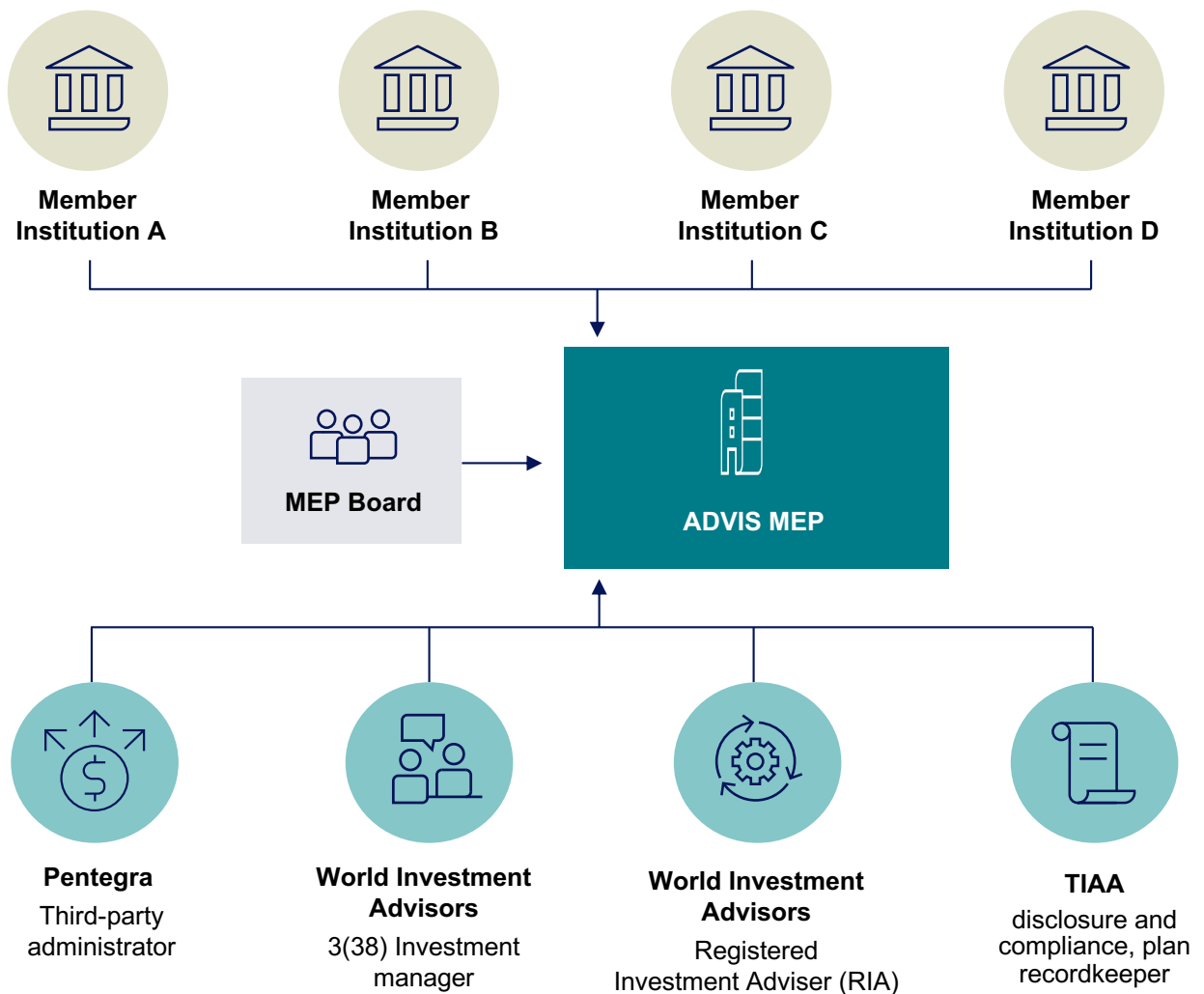
Take advantage of the competitive pricing that's possible because the entire program's assets are leveraged to negotiate prices and services. This can lead to providing employees more robust plan options at a reduced cost without adding any administrative burden to you.

Everybody wins when you join the ADVIS MEP.

Benefits for you:	Benefits for your employees:
Centralized administrative and fiduciary support, reducing HR's workload	Robust retirement plan options, giving people more choices for responsible savings
Delegated investment selection and monitoring, mitigating fiduciary liability	Best-in-class suite of investments to select from in their retirement plan
Better financial outcomes for your employees with retirement planning education and consulting	Award-winning participant educational tools and resources from the plan's recordkeeper ³
Enhanced benefits at potentially lower costs	Financial consulting support and resources to help with retirement readiness

Meet your ADVIS MEP team—they work for you.

Our strength comes from the support of the different service providers. With each of them bearing some of the responsibility of managing your retirement plan, you're free to focus on other programs that are beneficial to your employees.



Working together, the plan providers help deliver the resources, tools and services plan sponsors need.

You're supported by expert providers.

By coming together, all ADVIS MEP institutions have access to a team of highly regarded and experienced providers.

World Investment Advisors

Responsible for providing ongoing education, help and advice to plan participants, including on-campus education services and individual financial planning meetings

Pentegra

The ERISA 402(a) named fiduciary and ERISA 3(16) plan administrator responsible for day-to-day operations, administration and ongoing compliance of the plan

World Investment Advisors

ERISA 3(38) investment manager, responsible for selecting, managing, monitoring and benchmarking the investment offerings of the plan

TIAA

Plan recordkeeper offering 100+ years of experience in plan sponsor and participant services by collecting and allocating contributions, executing transactions, and providing plan reporting for compliance and regulatory requirements

Contact us to learn how the ADVIS MEP can help you.

We're happy to answer any additional questions you may have.

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1. Better Together? Multiple Employer Plans—Understanding Plan Sponsor Perceptions and Intentions, LIMRA Secure Retirement Institute, 2019.

2. Deb Dupont, “What’s Old Is New Again”, LIMRA Secure Retirement Institute Review, Issue 2, 2019.
limra.com/siteassets/research/publications/sri-review/2019/number-2/dupont_cover_meps_2019_2.pdf.

3. TIAA’s best practices in offering investment and financial education to Defined Contribution plan participants have been recognized by Pensions & Investments (2017, 2018, 2021-2023 Eddy Awards), Plan Sponsor Council of America (2017, 2020 and 2021 Signature Awards), and the Mutual Fund Education Alliance (2016 Star Retirement Award). tiaa.org/public/about-tiaa/news-press/press-releases/2023/03-28
tiaa.org/public/about-tiaa/awards-recognition

The information expressed herein is for general information only and does not constitute legal, tax, securities or investment advice.

Investment manager 3(38) services when offered are provided by World Investment Advisors.
ADVIS, World Investment Advisors, Pentegra and TIAA are separate unaffiliated entities.