

Take Control of Your 401(k) —

More Options. Professional Management. No Extra Cost.



Most 401(k) plans limit you to a small set of employer-selected funds. A Self-Directed Brokerage Account (SDBA) changes that by giving you access to hundreds, even thousands, of additional investment options — including stocks, ETFs, mutual funds, and more — all within your current 401(k) plan.

What makes this program stand out?

- **Access** to vastly expanded investment choices, so you can pursue a more customized retirement strategy
- **Active**, professional management from experienced advisors who guide your investments and adjust as markets change.
- **No extra fees** for you or your employer — we're compensated by the fund companies, so there's no cost barrier to better options.

How does it work for participants?

- Move part or all of your assets (tax- and penalty-free) into a brokerage account window inside your 401(k).
- Gain control to choose from a much broader set of investment options beyond the core plan menu.
- Assets remain inside your retirement plan — there is no rollover or taxable event.
- Receive active, tactical management designed to minimize risk and remove emotion from investing.

Why consider this now?

- Missing the worst days in the market can save years of recovery time.
- Emotional investing can lead to costly mistakes; professional guidance helps keep you on track.
- Studies show working with an advisor can lead to significantly higher retirement balances — potentially up to 79% more.*
- Your company's plan is eligible for this enhanced approach, which is a major advantage!

*Source: Financial Engines & Aon Hewitt study. Past performance does not guarantee future results.

Ready to get started?

Schedule a meeting:

<https://calendly.com/integratedwm/401k>

Give us a call: 316.669.8009

Send us an email: admin@iwmp.com

More Choice. Personal Guidance. No Added Cost.

Diversification and asset allocation strategies do not assure profit or protect against loss. Past performance is no guarantee of future results. Investing involves risk. Depending on the types of investments, there may be varying degrees of risk. Investors should be prepared to bear loss, including loss of principal.