HILL INVESTMENT GROUP
Take the long view®

Integrated Outside Account Management

We've dreamed of bringing you this service since our founding. Thanks to new technology, we can now integrate outside accounts (401k, 403b, etc.) to be managed as part of your comprehensive plan for the first time.

WHY THE CHANGE: Technology and securities regulations
Historically, the regulatory environment and technological limitations hindered our ability to help you with your 401k or other employer-sponsored plans. Despite these limitations, we have done our best to advise on these accounts because we believe it's the right thing to do as fiduciaries.

While we have been able to provide general recommendations, the burden has been on you to loop us in on investment options, fees, and, ultimately, placing trades. This portfolio management method is inefficient, manual, ripe for errors, and involves work that we should be doing for you. That's why you hired us!

WHY IT MATTERS: Peace of mind knowing ALL your assets are taken care of
Your 401k will no longer be an orphaned part of your financial picture. You get the benefit of:

- **Timely trading and rebalancing** – we'll handle 100% of this burden currently on you.
- **Quarterly review of your plan fee structures and available funds,** ensuring you are invested in the most efficient options. Before now, technological limitations meant we could only do this review once or twice a year.
- **Coordination and tax-efficient asset location** – maximizing the value of the 401k vehicle as a part of your overall strategy. This is a new benefit for you.
- **Better security** - This new technology allows us to provide you with a high level of service while maintaining our rigorous safety and SEC compliance standards. This is why it will be our preferred and only recommended outside account solution going forward.

COST:
These accounts will be managed as a part of your total portfolio and billed according to your regular fee schedule. New clients pay an implementation fee for this service. As a long-term client, 100% of the implementation fee will be waived.

NEXT STEPS:
We'll reach out to schedule a call. We'll discuss how this new solution fits your specific plan and goals. To set it up, all you'll need is your login information handy: URL, username, and password. Once we log in, you will be all set!