

Your Retirement Plan's Investment Manager

GoalPath Solutions is a Registered Investment Advisor serving as the ERISA 3(38) Investment Manager for your retirement plan. We support you and your retirement plan advisor.

The Value of a 3(38) Investment Manager

GoalPath's job is to select, monitor, report on, and, as necessary, replace the investments available in your retirement plan.

We take on a **fiduciary role** and are accountable to plan participants for acting prudently.

We **reduce your liability, burden, and effort** associated with investment management.

How We Support Your Advisor

Your advisor plays a key role in understanding your needs and objectives. As your plan's Investment Manager, we collaborate with your advisor to help you achieve the goals of your benefit plan. And by performing in the capacity of a fiduciary, we help you and your advisor achieve these goals while reducing risk.



225+

INSTITUTIONAL CLIENTS



\$2.5B+

ASSETS SERVED



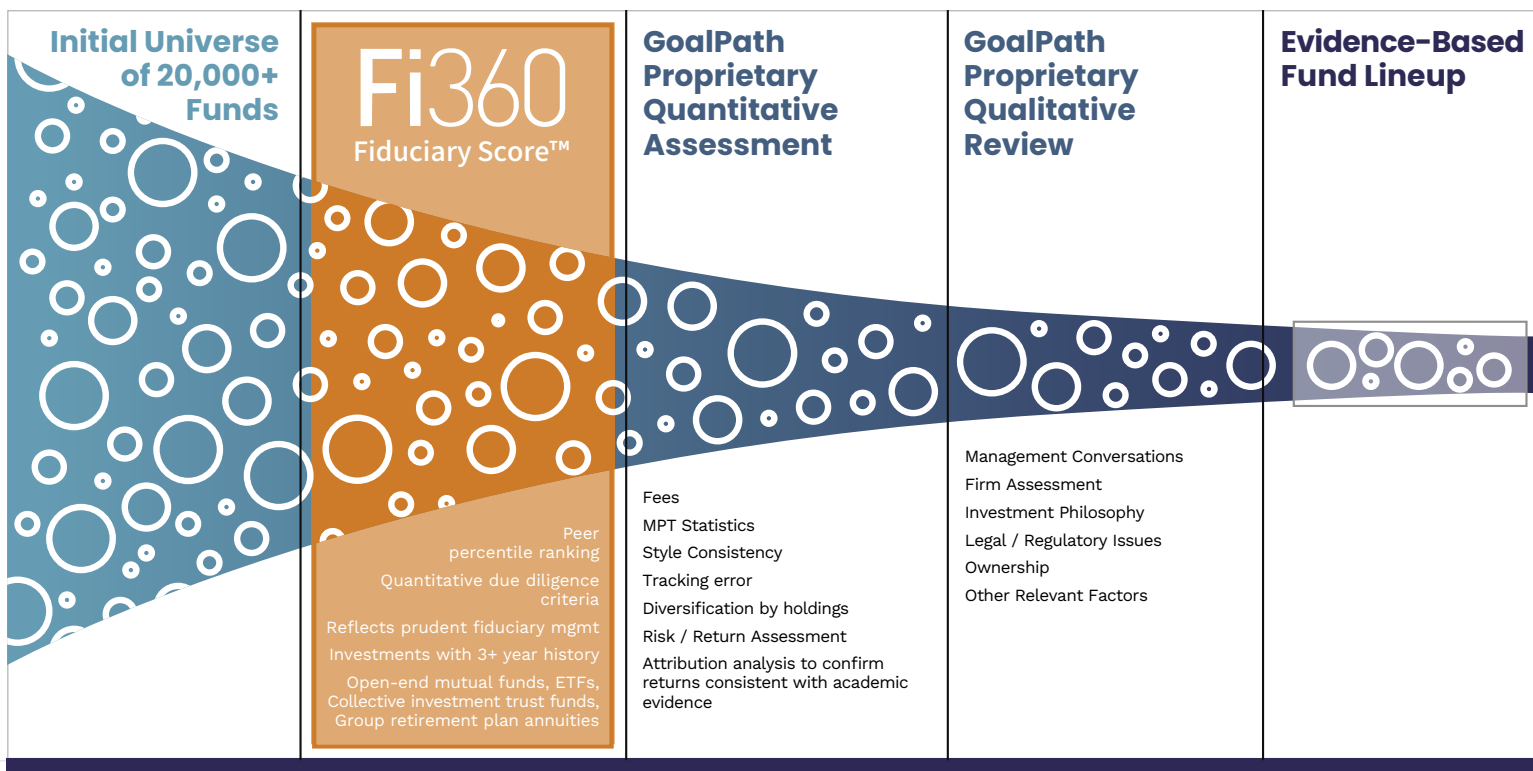
35,000+

PARTICIPANTS SERVED

Our Investment Philosophy

As you might expect, we have a robust philosophy and process that we use everyday in screening, scoring, and selecting investments that are appropriate for your retirement plan. They include both quantitative and qualitative factors as we review and monitor short- and long-term performance.

As your plan's Investment Manager, we're responsible for choosing and monitoring investments that provide the quality and diversification participants rely on in making their own allocation choices.



Reports You Can Expect Each Quarter

Every quarter we share information and insights with you and your advisor about the performance of the funds. Our goal is to make it easy for you to understand our process and to help you fulfill your oversight responsibilities.



For Plan Sponsor Use Only

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GoalPath
SOLUTIONS