

# Is Your Portfolio on Track?

## RiversEdge Now Offers Held Away Account Management

Do you have a 401(k)? A 403(b)? An HSA? Or maybe a 529 education savings plan? Traditionally, these held away assets did not receive the care and attention they deserved. Now, your financial advisor is able to view, manage, and trade your held away accounts, just like the rest of your investable accounts. And, in return, you receive the benefits of a holistic, professionally managed portfolio.

## Benefits of Held Away Account Management



**Comprehensive Account Management** by consolidating all your accounts with one trusted advisor



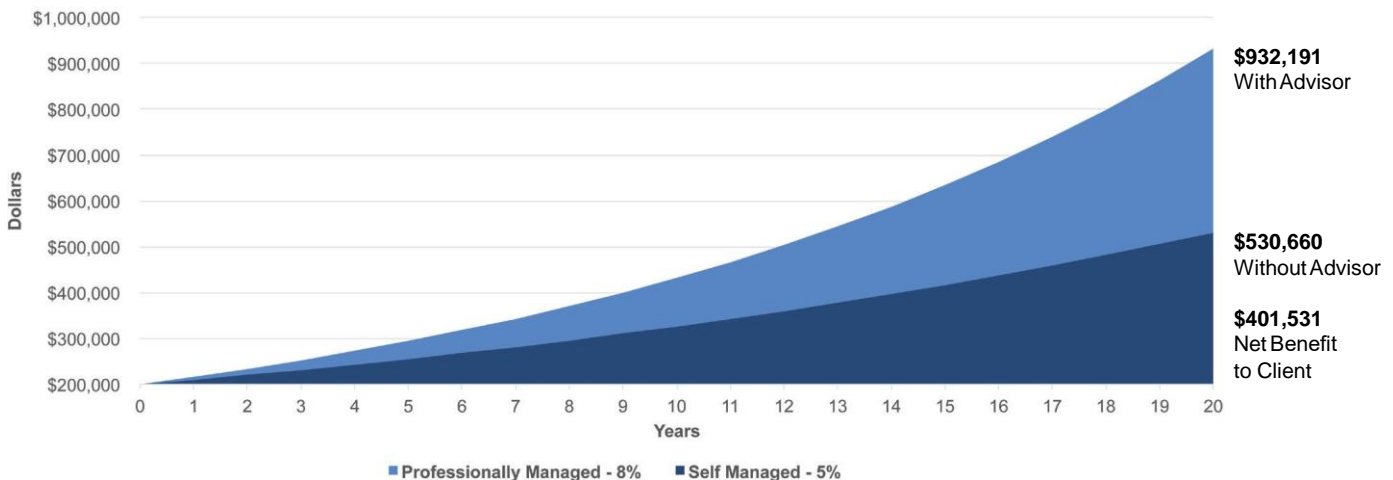
**Better outcomes** by having all accounts actively managed



**Asset location strategies** which can reduce significant tax burdens

**“Studies show that managed accounts outperform non-managed accounts by 3.32%, net of fees. For a 45-year-old participant, this could translate to 79% more wealth at age 65.”**

### Professionally managed 401k's outperform self-directed 401k's by 3.32% annually, net of fees\*



## About RiversEdge Advisors, LLC

Our firm was created to provide a collaborative planning process for clients to get answers to their most pressing financial questions and a clear strategy on how to achieve their unique financial goals.

Today, we proudly provide an environment in which people can obtain unbiased advice and a clear understanding of the recommendations at hand.