



GROW YOUR BUSINESS WITH SDBAs

Manage your clients' current workplace retirement accounts

You and Flexible Plan Investments can manage an individual's current 403(b), 457, or 401(a) retirement plan account that has adopted the self-directed brokerage account (SDBA) option.

Do you have clients that work here?

Arizona State University
Athens Regional Medical Center
Auburn University
Banner Health
Beaumont Hospital
Boston College
Brigham Young University
Brown University
California State University
City of Chicago
City of Los Angeles
Clemson University
Cleveland Clinic
Crittenton Hospital
Dignity Health

Duke University
Georgia State University
Kettering Health
Mercy Hospitals (CHP)
Miami University
Michigan State University
Morehead Memorial Hospital
Ohio State University
Palmetto Health
Rice University
St. Jude Children's Research Hospital
State of Arizona
State of Florida
State of Iowa
State of Michigan

State of New York
State of Pennsylvania
Texas A&M
Texas Children's Hospital
UNC Physicians and Associates
University of Georgia
University of Michigan
University of Missouri
University of North Carolina
University of Tennessee
University of Texas
Vanderbilt University
Vanderbilt University Medical Center
... and *many more*.

Flexible Plan Investments can manage many plans. Call to see if your client's plan qualifies.

This is not a rollover or an in-service distribution.

You do not need to bill the client or be the rep of record at the plan level.

Contact your regional business
consultant at Flexible Plan
Investments for any questions.

Name:

Email:

Phone Number: