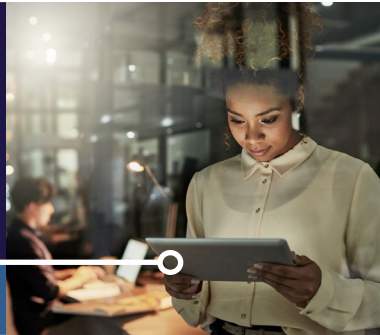




intellicients®

intellicients bioni(k) managed accounts now available on Schwab Recordkeeping Platform

September 2020



intellicients bioni(k) managed accounts are now available on the Schwab Retirement Plan Services, Inc. recordkeeping platform.

"Our goal is to have [bioni\(k\)](#) available on all of our major recordkeeping relationships. We think that managed accounts are the next generation of in-plan investment advice for 401(k) and 403(b) participants," commented Grant Arends, Co-Founder and President of intellicients. "We don't believe that all 35-year-olds in a plan should be invested exactly the same way. [bioni\(k\)](#) takes into account a dozen different variables rather than just age, offering more personalized advice to the participant. It coordinates ideally with our wellness messaging."

"intellicients is a thought leader in the 401(k) and 403(b) space," commented Catherine Golladay, Executive Vice President of Workplace Financial Services at Charles Schwab. "Their financial planning approach to worksite financial wellness fits hand-in-glove with our emphasis on the participant experience and outcomes."

"We have had a wonderful long-term relationship with the Charles Schwab organization that dates back decades," added Brad Arends, Co-Founder and CEO of intellicients. "They are a first-class company with a pristine brand that has always stood for putting the client first. We are delighted that intellicients [bioni\(k\) managed accounts](#) will be available on their retirement recordkeeping platform for our advisors."

For more information on the [bioni\(k\) managed accounts](#) click [here](#) or call 800-880-4015.

about intellicients

intellicients is reimagining financial services for employers and individuals. Through retirement plan design and fiduciary investment consulting, personal financial management, group insurance, and worksite financial wellness services they are paving a smarter way for the American worker and their employer. With headquarters in Albert Lea, Minnesota, and branch offices in Eden Prairie, Minnesota; Pella and Lake Mills, Iowa; Overland Park and Lawrence, Kansas; Tacoma, Washington; Golden, Colorado; and Arlington, Texas, they serve over 350 employers, with 48,000 participants, and over \$4 billion in assets under management and advisement. More information about intellicients can be found at www.intellicients.com.



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Investment advisory services offered through intellicients investment solutions, inc., an SEC registered investment adviser.

dreams
make it real.