

SWBC APPROVES STADION MANAGED ACCOUNT

WATKINSVILLE, GEORGIA, USA, April 6, 2021 /EINPresswire.com/ -- [Stadion Money Management](#), an independent managed account provider who offers personalized retirement services to plan sponsors and their participants, announced that [SWBC](#) has approved



their managed account service, StoryLine. SWBC has approved StoryLine for use under both their 3(21) and 3(38) Investment Fiduciary Services, providing a fiduciary package which offers both SWBC's plan-level and Stadion's participant-level fiduciary coverage. This approval also allows StoryLine to be selected by plan sponsors as an SWBC-approved QDIA at multiple recordkeepers.



Having SWBC's approval of our managed account service validates our approach to helping individual employees prepare for their retirement."

*Jud Doherty, President & CEO
of Stadion*

"We believe that a managed account service can truly make a difference in helping participants improve retirement readiness. Having SWBC's approval of our managed account service validates our approach to helping individual employees prepare for their retirement," said Jud Doherty, President & CEO of Stadion. "SWBC offers a level of expertise and oversight that can be a fit for retirement plans looking for assistance with their investment options."

StoryLine is a professionally managed investment service that uses participant data provided by recordkeepers to build personalized allocations, with no engagement required. Participants can then further personalize their portfolio through an online experience. StoryLine is designed to include factors beyond a participant's target retirement date, such as salary, retirement plan balance, risk tolerance, contribution rates, and additional assets held outside of the retirement plan. StoryLine offers an easy-to-use experience, access to Stadion's U.S.-based call center and ongoing communications to promote retirement readiness.

As a 3(38) Fiduciary, SWBC is responsible for the selection, monitoring, and replacement of investment alternatives for retirement plans. "We believe our role as a fiduciary is a critical component of plan design. Our initial research and ongoing monitoring of investment solutions

serves as a resource to advisors as they expand their focus in the retirement plan market. Our fiduciary services provide the framework for advisors and plan sponsors to build comprehensive retirement solutions that serve what we believe are the best interests of retirement plan participants," said Brad Ferguson, Executive Vice President of SWBC Retirement Plan Services.

About SWBC

As a diversified financial services company, SWBC provides financial institutions, businesses, and individuals a wide range of services, including insurance, mortgages, wealth management, employee benefits, and more. Headquartered in San Antonio, Texas, SWBC has partners and divisions across all 50 states and manages business around the world. No matter how wide its reach, SWBC always listens to its customers' needs, analyzes their current situations, and recommends customized solutions. For more information about our innovative approach to personalized service, visit SWBC's website at swbc.com.

About Stadion Money Management

Established in 1993, Stadion Money Management is an independent firm headquartered near Athens, Georgia. Stadion works with financial professionals and recordkeepers to build custom retirement plan and participant level investment solutions. As of 2/28/21, Stadion managed approximately \$3.0 billion. Visit Stadion Money Management at www.stadionmoney.com

Past performance is no guarantee of future results. Investments are subject to risk, and any of Stadion's investment strategies may lose money. Forward looking statements cannot be guaranteed. There is no assurance of the future performance of any Stadion account. The opinions expressed are those of Stadion Money Management and are subject to change without notice. Stadion is a registered investment adviser under the Investment Advisers Act of 1940. Registration does not imply a certain level of skill or training. More information about Stadion's investment advisory services can be found in its Form ADV Part 2, which is available upon request. SMM-032021-224

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