Enrollment Booklets and Forms Get a Refresh

To help streamline the enrollment process for clients and advisors, we're making some changes to enrollment booklets and forms for the following programs: Advisor Mutual Fund, SFR, and Workplace Retirement Program. These changes consolidate the collection of enrollee information and reduce the potential for content to get outdated.

What Changes Can I Expect?

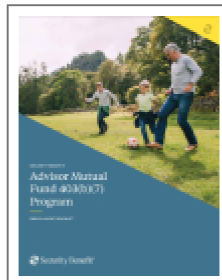
- 50% fewer pages to work through
- Pricing and performance reports will move online (a QR code is provided)
- For fee-based purchase options, finding a separate form is not required for investment advisor authorization
- Mesirow risk quizzes will not be included, but you can still download and order them separately

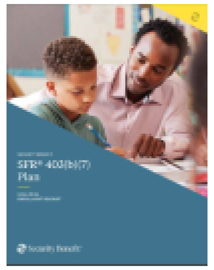
What does this mean for me?

Less ordering!

Many of our financial professionals order new enrollment booklets on a quarterly basis to ensure the performance reports are up to date. Now, you don't have to! These changes mean booklets will remain current longer and reorders only need to take place as funds are updated.

Take a peek at our new format:

		Advisor Mutual Fund 403(b)(7) Program

		SFR Program - 403(b)(7)
		Workplace Retirement Program

Related Resources

- Advisor Mutual Fund 403(b)(7) Program
- SFR Program
- Workplace Retirement Program for ERISA Plans
- Workplace Retirement Program for Non-ERISA Plans

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