Since our founding over 20 years ago, we have worked through almost every conceivable market environment — crashes, bull markets, bear markets, bubbles, recessions, expansions, and a variety of political and tax environments. We've seen a wide variety of client situations, and we've responded with effective solutions. As a 3(38) Fiduciary to your plan, you can utilize our experience to manage the investments for your plan and allow you to run your business.

Align Wealth Management helps you navigate your fiduciary responsibilities and enhance opportunities for participants through systematic, quantitative and qualitative investment analysis using our intuitive **Scorecard^{SM} System**.

Our state of the art **Investment Due Diligence System** provides robust and continually updated data allowing us to prudently select, monitor, and evaluate plan investments within a best practices environment. You know more because we know more.

Independent Reviews

Well-qualified to formulate individual recommendations, our consultants apply profound knowledge in statistical analysis to go far beyond typical investment screenings. Driven by insight and independent impartiality. Using the latest in technology and systems to produce best outcomes on your behalf, we will:

- Conduct Investment Analysis with our Exclusive **Scorecard^{SM}** System
- **Rank Hundreds of Funds, Managers and Strategies** with Unbiased Precision
- **Monitor Asset Allocation** Funds and Models
- Uncover and Develop Greater Insights with our **CFA-Led Research Team**
- Deliver **Valuable Investment Policy Statements**, Monthly and Quarterly Market Commentaries, and Online Access

Fund Selection and Evaluation

More than 15 qualitative and quantitative metrics are used to select and rank funds, managers and investment strategies across multiple asset classes, peer group rankings, and risk-adjusted return characteristics. This allows for incisive and objective reviews in the interest of your plan, your company, and your employees.

You will know exactly where your investments rank based upon our 1 to 10 pass/fail scoring system. Comprehensive reports and our monthly sponsor newsletters will keep you well-informed and current on industry trends and legislative developments.

Above all, your voice is heard and understood. Our team provides simple, elegant, and low cost investment strategies that we have implemented for over 20 years - and we communicate that to you with clear, consistent communications.

Let’s get started and deliver the benefits you deserve.