



intellicents®

introducing bioni(k) managed accounts *a smarter way to (k)*

*intellicents joins forces with Morningstar
Investment Management to launch
custom managed account product.*



June 2020 - intellicents has announced it will begin using Morningstar Investment Management's advisor managed accounts service to power the [intellicents bioni\(k\) managed account solution](#).

"We believe managed accounts are the natural evolution of in-plan investment advice for 401(k) and 403(b) plans," commented Brad Arends, Co-Founder and CEO of intellicents. "No longer should investment decisions get made solely based on age. Should all 40-year-old participants in a plan be invested exactly the same way? Target date funds once made sense, but technology today provides a smarter way."

That "smarter way" goes well beyond age as the single variable for investment strategy. "Finally, a goals-based financial planning approach to managing a participant's investments, and it's integrated with many recordkeeping platforms," added Grant Arends, Co-Founder and President of intellicents. "The Morningstar Investment Management technology can take into account dozens of separate variables to look at the participant as a whole. Together with our intellicents professionals, [bioni\(k\)](#) can advise them on their contributions, investment allocations, retirement age, and Social Security start date. It's a perfect complement to our message of financial planning as the key to a successful worksite financial wellness program."

intellicents already has one 2,000+ participant plan committed to auto re-enrolling everyone into its [bioni\(k\) managed accounts](#) this fall, and several other plan sponsors are considering their use. Leadership also believes it will be an invaluable tool in attracting additional experienced retirement advisors to join their ever-growing intellicents team.

about intellicents

intellicents 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 intellicents can be found at www.intellicents.com.



intellicents®

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

dreams
make it real.