

GUARDIAN PROMISE RETIREMENT PLAN

The Guardian Promise 403(b)9 Faith-Based Retirement Plan offers religious organizations greater ability to tailor a retirement plan to their needs.

RETIREMENT PLANNING FOR FAITH-BASED ORGANIZATIONS

The advantages of Guardian Promise are available to any religious 501(c)3, with robust investment options including Biblically Responsible Investments (BRI).

HOW GUARDIAN PROMISE IS DIFFERENT

- Better investment choices, including industry-leading access to ETFs, mutual funds, annuities, and fixed income options.
- Biblically Responsible Investment (BRI) options
- Ability to accommodate housing allowance distributions with proper tax reporting.
- Dedicated client portals to view accounts and investments.

SECURE INCOME OPTIONS THROUGH:



INVESTMENT OPTIONS INCLUDE COMPANIES LIKE:



*INVESTMENTS MANAGED THROUGH SIMPLICITY WEALTH



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