

Take control of Annuity assets with RetireOne®

Unlock new revenue streams by transitioning legacy annuity assets into your advisory practice with a tax-free 1035 Exchange. RetireOne's fiduciary-focused insurance and annuity marketplace helps reduce client fees and enables you to bill on these assets—without product bias.

We help identify client needs and locate transparent, low-cost annuities and insurance solutions that are easy to explain and simple to use. Compliance and suitability, education, and ongoing servicing and support are packaged with the service at no additional cost.



No need to be licensed
or Finra registered¹



Accountable, single
point of contact



Managed assets connected
directly or via DST

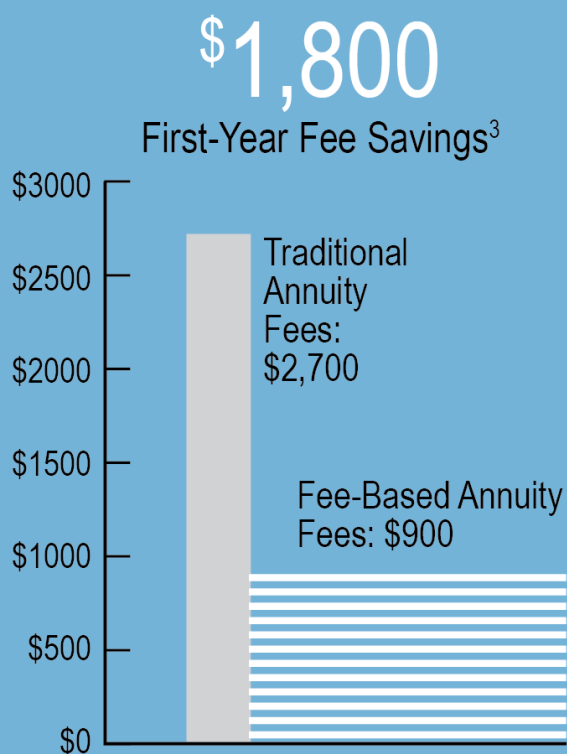
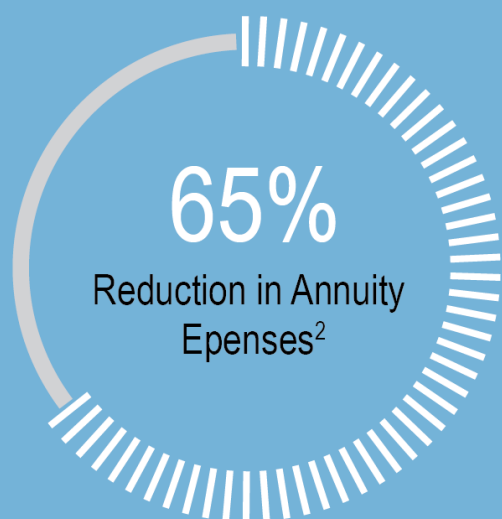


Managed Simple, tax-
free, 1035 Exchange

Rescue client annuities in 6 steps

- 1 **Review** - RetireOne experts review client statements to analyze current client scenario and needs.
- 2 **Illustrate** - We use Morningstar Annuity Intelligence and other tools to compare solutions.
- 3 **Apply** - If we locate an appropriate solution, we pre-fill applications and send them back to you for signatures.
- 4 **Sign** - You collect all signatures and provide missing information. We ensure it is all in good order.
- 5 **Suitability analysis** - Transactions made on behalf of your clients undergo multiple levels of suitability review.
- 6 **Connect** - Once the account funds, we help connect the accounts directly or via DST.

Our stats.



1,200+
RIA Partners Served

\$0
Additional Cost

¹ Insurance laws and regulations vary from state to state. If you do not have an insurance license, you should be aware of the specific rules that apply in your state. Please consult with an attorney in your state for guidance. ² Assumes a fee difference of 90 bps—45 bps M&E for no-load VA vs. 135 bps for average traditional VA (according to Morningstar 12/18). ³ First-year fee savings based on \$200,000 traditional variable annuity account charging 135 bps M&E vs. IOVA charging 45 bps with a 6% return assumption.

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Non-registered insurance products are sold by RetireOne, Inc. (RetireOne), a licensed insurance agency (resident KY license no. DOI-778494). In CA and AR, RetireOne is doing business as R1 Insurance Solutions, Inc., (nonresident license no. 0H44773 and 100107906, respectively).

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Questions? Call (877) 575-2742

www.RetireOne.com

