

ADVISORS

Modern recordkeeping meets high touch service

Vestwell Flex pairs our modern, digital recordkeeping platform with the high touch service that TPAs provide - all with the ease of a streamlined client experience.

Why choose Vestwell Flex?

Flex is a streamlined solution for clients looking for the best of both worlds.

1

EFFORTLESS TPA PARTNERSHIP

Select your preferred TPA at **one streamlined price**. Save time sourcing TPAs so you can focus on the businesses you serve.

2

SIMPLIFIED PRICING

Consolidated fees, billing and contracts make **your client's experience smooth & seamless**.

3

HANDS-ON SUPPORT

Our **trusted TPA partners** can help you and your clients with plan consultation, profit sharing, and outside assets.

Why partner with Vestwell?

- ✓ Open architecture
- ✓ Modern technology
- ✓ Dedicated service team
- ✓ 50+ payroll integrations
- ✓ Streamlined administration
- ✓ White labeling capabilities
- ✓ Managed accounts
- ✓ Plan design consultation
- ✓ Investment oversight
- ✓ Automated contracts & billing

Reach out to tpasales@vestwell.com to learn more.