



## **Vantage Benefits adds global asset manager Russell Investments as a Success Partner**

### ***Professional fiduciary services provider Vantage selects Russell Investments as 3(38) investment manager for newly formed Vantage Retirement Trust.***

**DALLAS, Oct. 18, 2017** — Vantage Benefits Administrators, Inc., a full-service employee benefits consultant, Third Party Administrator (TPA), recordkeeper and professional fiduciary, today announced that Russell Investments is now part of the Vantage Success Partners program. More specifically, Vantage has selected Russell Investments as the 3(38) investment manager for a newly formed Vantage Retirement Trust, a comprehensive retirement plan solution for plan sponsors offering cutting-edge investment management from Russell Investments and full-scope fiduciary services from Vantage Benefit Administrators. Russell Investments will build and monitor the Trust's investment option menus and models.

In the Vantage Retirement Trust, each employer-sponsored retirement plan exists as a unit of the larger trust, which is designed to offer comprehensive retirement plan compliance and administration in a single, efficient package. The Trust is designed to deliver critical efficiencies and stability in today's changing world of regulatory requirements, as Vantage has the ability to help minimize a plan sponsor's liability to the maximum extent possible under the Employee Retirement Income Security Act of 1974 (ERISA).

"The Trust combines the assets of all participating employers, creating economies of scale that may result in better investment selections, such as institutional quality investments, as well as lower costs for the plan sponsor and plan participants alike. The Trust provides a cost-effective, robust retirement plan that simultaneously reduces fiduciary responsibilities and liability for plan sponsors," explained Vantage CEO Jeff Richie.

Added Richie, "We are excited about our partnership with Russell Investments. Russell Investments will deliver their investment management experience gained from working with some of the largest, most sophisticated investors in the world to the plan sponsors utilizing the Vantage Retirement Trust. Russell Investments' involvement and expertise will enable us to further expand our Trust solutions to address a unique set of employer needs. We look forward to working with this prominent global asset manager."

Organizations selected to work with Vantage Success Partners share Vantage's commitment to the unbiased pursuit of participants' best interests. With its open-architecture, level-fee platform and unbiased investment selections, Vantage only considers working with firms equipped to operate according to the same values.

"Vantage has developed an innovative offering to serve the growing fiduciary solutions marketplace," said Holly Verdeyen, senior director, defined contribution strategy at Russell Investments. "Our focus on creating open-architecture, institutionally-priced investment solutions is highly complementary with Vantage's commitment to deliver scale and cost efficiencies to plans of all sizes. We look forward to playing the important role of 3(38) investment manager in such a comprehensive and turn-key retirement program."

The defined contribution team at Russell Investments keeps pace with global markets and investment trends with an emphasis of seeking to reduce risk and enhancing returns. Through its multi-asset investing process, which leverages a unique set of capabilities in capital markets insights, manager research, asset allocation, portfolio implementation and factor exposures, the firm is able to offer Russell Investments' researched "best-in-class" investment managers and investment selections to employers and, in turn, to their employees.

"Vantage has always operated in the best interest of plan participants," said Richie. "The current timing of the Department of Labor (DOL) rulings has underscored Vantage's commitment to continued leadership in meeting new compliance regulations."

Vantage is planning other strategic announcements in the coming weeks.

### **About Russell Investments**

Russell Investments, a global asset manager, offers multi-asset portfolios and services which include advice, investments and implementation. Russell Investments stands with institutional investors, financial advisors and individuals working with their advisors—using the firm's core capabilities that extend across capital market insights, manager research, asset allocation, portfolio implementation and factor exposures—to help each achieve their desired investment outcomes. The firm has more than \$289 billion in assets under management (as of 9/30/2017). Headquartered in Seattle, Washington, Russell Investments operates globally with 21 offices, providing investment services in the world's major financial centers such as London, Paris, Amsterdam, Sydney, Tokyo, Shanghai, Toronto and New York. For more information about how Russell Investments helps to improve financial security for people, visit [russellinvestments.com](http://russellinvestments.com).

### **About Vantage**

Vantage Benefits Administrators, Inc., is a full-service employee benefits consultant, Third Party Administrator (TPA), recordkeeper and professional fiduciary. Vantage specializes in comprehensive, cutting-edge corporate benefit program administration, offering fiduciary services as needed. Independent of all carriers and investment product providers, Vantage is unbiased in its pursuit of its clients' best interests. The company emphasizes transparency, integrity, responsiveness and cost efficiency. For more information, please call 1.800.337.8005 or visit [www.vantagebenefits.com](http://www.vantagebenefits.com).

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Russell Investments' ownership is composed of a majority stake held by funds managed by TA Associates with minority stakes held by funds managed by Reverence Capital Partners and Russell Investments' management.

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