GLOBAL
ADVISOR GROUP

Dedicated to serving the retirement planning needs of the international school community.

MATCHED SAVINGS PLAN

1939 Roland Clarke Place, Suite 400, Reston, VA 20191
Toll Free: 800-356-5585 ·Phone: 703-406-8440 · Fax: 703-406-8441
www.GlobalAdvisorGroup.com

GLOBAL ADVISOR GROUP

What is a Matched Savings Plan?

A simple, flexible, and cost-effective program that schools can offer to encourage and support their staff to set aside funds for savings and retirement.

Key Benefits

- **Available to US and non-US citizens.**
- **Contribution limits may vary depending on the type of account and local jurisdiction restrictions; please consult a financial advisor for specific details.**
- **Contributions are invested in model portfolios under the jurisdiction of US financial authorities.**
- **Offshore investment options are available to non-US citizens.**
- **Global Advisor Group financial advisors are fiduciaries and act in the best interest of their clients.**

EMPLOYEE SERVICES

Investment Management

Retirement Planning

Tax Planning

Education Planning

Estate Planning

The MSP is offered by International Schools around the globe with thousands of educators actively enrolled in the program. Participant accounts are flexible and can easily move with the international educators as they change schools.

Our Financial Advisors Will Guide You Each Step of the Way

1

PLAN DESIGN

Global Advisor Group helps the school establish the plan structure—eligibility, match, and in-service withdrawal rules.

2

ENROLLMENT

Our advisors work with employees to assist with account setup and selecting investments suited to their goals and risk tolerance.

3

CONTRIBUTIONS

Employees choose their contribution amount, subject to plan rules and applicable local jurisdiction contribution limits, which are detailed in the plan documentation. The school remits both employee and matching funds (if applicable) to be invested.

4

PLAN SERVICES

Employees receive account reviews, which could include financial planning support, including retirement, education, estate planning, portfolio management, and tax strategies.

5

ACCOUNT ACCESS

Participants can view their accounts online or on the mobile app.

6

ACCOUNT FEES

Standard portfolios charge a 1% advisor fee plus a 0.15% program fee. Additional costs or risks may apply, as detailed in the plan documentation.

Our Financial Advisors are committed to acting in the client's best interest, adhering to fiduciary standards as required by applicable regulations.

OUR SERVICE TEAM

James T. Barnette, Jr. CFP®
Chief Executive Officer

Julia Simmons
EARCOS | NESA

Nathan Addo CFP®
AISA

Lone Bjork
Europe | MAIS

Rodrigo de la Roca CFP®
Tri-Association | AMISA

Asif Kuchey
Pakistan

Joan Confoy CFP®, CPFA®, AIF®
Director of Group Retirement
Plan Services

Nathan Barnette CFP®, CPFA®
Retirement Plan Consultant