



**BLB&B Advisors, LLC**  
FINANCIAL GUIDANCE SINCE 1964<sup>SM</sup>

BLB&B Advisors, LLC oversees approximately \$1.9 billion in client assets. With a 57-year history in the financial services industry, we offer a comprehensive suite of wealth and investment management services to a wide range of individual, non-profit, and corporate clients. As an SEC-registered fiduciary, BLB&B Advisors strives to provide its clients with high quality, low cost, and, when appropriate, tax efficient investment portfolios.

## 401K Services

For over ten years, BLB&B Advisors has provided ERISA 3(21) and 3(38) fiduciary services to qualified plans. Typical clients include small and medium-sized businesses that want to offer robust, cost-efficient, customized, and user-friendly 401(k) retirement plans to their employees while maximizing tax deferral options for owners.

Our services to our corporate clients include:

- Connecting business owners with other well-regarded and creative 401(k) administrators, plan designers, and custodians
- Helping to select a diverse group of mutual funds for plans based upon key criteria relating to performance, fees, management tenure, and third-party ratings
- Ongoing monitoring, reviewing, and updating of the mutual funds offered in plans
- Educating plan participants about the plan and the various investment options inside the plan, the need to save for retirement, and the importance of asset allocation
- Serving as an ongoing resource to plan participants should they have questions about the investment options or other plan features
- Designing plan investment policy statements and managing plan assets on a discretionary basis
- Working directly with individual plan participants to manage their sub-accounts on a discretionary basis

## Our Retirement Planning Services for Business Owners

In addition to helping business owners offer well-run and low cost retirement plans to their employees, we also work closely with business owners to help them structure their personal retirement savings plans to maximize their ability to save for retirement in a tax-advantaged manner.

**PLAN. INVEST. SUCCEED.®**

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Investment advisory services provided by BLBB Advisors, LLC. BLB&B Advisors, LLC is a Pennsylvania-based investment advisor registered with the Securities and Exchange Commission under the Investment Adviser Act of 1940. Registration as an investment advisor does not imply a certain level of skill or training. Past performance does not guarantee future results.

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