



Navigator: Aligned Governance Framework

On-demand solution providing everything advisors need to streamline your client services and governance needs

We know you're busy; that's why we're making it easy for you to access and initialize our governance framework. This process will help you support your clients, scale across clients to save you time, manage risk and secure new business.

How it Works

Not required by ERISA, but required to be a successful advisor; a governance framework:

- gives advisors a consistent basis for making decisions and creating processes that scale across your entire business
- provides a way to delegate tasks and communicate with from advisors to their clients
- organizes every responsibility of the advisors' fiduciary processes as well as what is agreed to do to support clients

Navigator provides a consistent, repeatable governance framework that is adaptable and encompasses all areas of fiduciary obligation.



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Navigator Helps Advisors

- Streamline Governance
- Keep up with new rules and regulations
- Grow their retirement business
- Train new advisors and staff
- All of this is on-demand and from the comfort of your own office, so no flights, hotel or conference fees to get what you need to implement today

Stay Current with Latest Regulation Updates

- ESG Investing
- Lifetime Income
- Cryptocurrency
- Cybersecurity
- Litigation Updates

Guides, Tools & Training Videos

- Navigator provides a variety of assets to help you communicate complex governance issues with ease across these four main categories: Service Providers, Investments, Employee Engagement and Operations + Administration
- The training + tools help you and your clients take action based on what you learn in each session



Ready to Learn More? Let's Schedule a Demonstration



Let's Chat

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