Corebridge Financial Solutions and Services

Action is everything.

Corebridge is a leading retirement plan provider for K-12 schools, government, healthcare, higher education and other not-for-profit institutions, with a long and proven track record of serving our clients. Through our strong partnerships with plan sponsors and consultants, a dedicated financial advisor network, and innovative technology solutions and tools, we make retirement planning easy and accessible and help people turn their financial dreams into realities.

CORE service makes your client's job easier

Service is at the C.O.R.E. of our relationship management model and is designed to make your client's job easier. We approach our relationships with a **Consultative** mindset, an **Outcome-oriented** focus, and a **Responsive** and **Empathetic** attitude.

Expert guidance creates better outcomes

Corebridge offers access to financial professionals who deliver in-depth, one-on-one retirement planning however and whenever employees prefer, regardless of income levels. We also provide valuable communication and education based on our partner's demographic data — allowing us to send employees the right message at the right time and engage them however they prefer. No matter where employees are in their life's journey, our action-driven approach can help them build brighter, more secure financial futures.

Client-driven innovation elevates the experience

We fully leverage the power of AI and technology — while also continuing to invest in our employees — combined, they improve our client experience. Combining smart tech with the participant touch means your client's employees will experience both personalized and empathetic support. Our empathy-driven approach keeps employees front and center.

Protecting employees' personal information is a top priority

We maintain a risk-centric approach to protecting participants' data. With Corebridge, you have a strong partner who understands what it takes to safeguard employees' personal information including multifactor authentication, e-delivery of personal documents and voice recognition technology to ease the verification process while protecting information.

Corebridge by the numbers*:

- Over **$380B** in assets
- Nearly **20,000** plan sponsors across the U.S.
- Over **1,100** financial professionals serving local communities

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Spotlight on flexible recordkeeping and administration

Proprietary SOC 2 recordkeeping system updated with current laws and regulations, with guidance on plan design, compliance, and administration provides your clients with straightforward solutions to complex plan needs—and is supplemented by seamless implementation services.

- Robust analytics that provide valuable plan insights.
- API-enabled payroll services provide eligibility, vesting and match calculations with streamlined distribution processing.
- Plan-wide e-delivery for statements, transaction notices and prospectuses.
- Employer notification package for regulatory updates.
- Integrated plan document, discrimination testing and 5500 process.
- Open architecture including CITs, VC funds and expanded fixed options from well-known fund families.

Consider these specialized solutions

- **Advisor Managed Accounts Service** – proprietary approach through Morningstar Investment Management LLC.
- **Guided Portfolio Services® (GPS)** – investment advisory service from independent experts.
- **Guided Target Models℠** – investment approaches for employees that take the guesswork out of saving for retirement.
- **Collective Investment Trusts (CITs)** – provide streamlined investment management and administration through portfolios with specific investment strategies.
- **Retirement Manager** – multi-vendor compliance solution helps reduce unnecessary costs while aggregating plan data securely.
- **Savi** – student debt solution that helps employees apply for public service loan forgiveness.
- **HealthSecure HRA®** – Tax-advantaged health retirement arrangement for public employees.
- **Total Retirement Services (TRS)** – offers defined benefit plan administration strategies.
- **Elder and Vulnerable Client Care Unit (EVCC)** – protects participants from financial exploitation.

For more information on how we can partner with you to create better financial outcomes for your clients and employees, contact us today!

* Assets under management/administration (as of 9/30/25) excludes Retail Mutual Funds and the Life Insurance business. In addition, Institutional Markets comprises the national value of stable value wrap contracts only, excluding the portion included in total insurance reserves.

corebridgefinancial.com/rs/consultant-relations

We're here to help you take action

Annuities are issued by **The Variable Annuity Life Insurance Company** (VALIC), Houston, TX or **The United States Life Insurance Company in the City of New York** (USL), New York, NY. Variable annuities are distributed by Corebridge Capital Services, Inc., member FINRA. Guarantees are backed by the claims-paying ability of the issuing insurance company and each company is responsible for the financial obligations of its products. **Beginning January 1, 2026, USL will be Corebridge Financial's sole authorized issuer of new annuities in New York.**

Securities and investment advisory services offered through VALIC Financial Advisors, Inc., member FINRA, SIPC and an SEC-registered investment adviser.

VALIC Retirement Services Company provides retirement plan recordkeeping and related services and is the transfer agent for certain affiliated variable investment options.

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Investing involves risk, including the possible loss of principal. Investment values of variable products fluctuate so that investment units, when redeemed, may be worth more or less than their original cost.

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VC 40009 (10/2025) J1790002 ER

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