

WE ARE THE

FLEXFIDUCIARY™

A discretionary investment manager with expertise in the retirement industry. LeafHouse developed proprietary technology that aims to prudently select, evaluate, and monitor investments that are solely in the best interests of plan participants and their beneficiaries.

CONTACT US

LeafHouse Differentiators



FLEXIBLE

LeafHouse recognizes each retirement plan is unique. We work with advisors and plan sponsors to create a customized investment lineup to meet their specific needs while providing fiduciary protection. For discretionary accounts, all investment decisions are made in-house using our proprietary LeafHouse Grade Point Average® system.



COST-EFFECTIVE

LeafHouse is a cost competitive investment fiduciary. Compensation is assessed as a percentage of total plan assets for investment fiduciary services. Our service adds a layer of fiduciary protection that we believe makes the plan even more valuable.



COMPATIBLE

Proprietary investment screening technology enables LeafHouse to be platform agnostic. We are integrated with dozens of recordkeepers and their distinct platforms. Plan sponsors can select their preferred recordkeeping partner, and LeafHouse can serve them on any platform.



INDEPENDENT

In an effort to minimize conflicts of interest, LeafHouse receives no commissions or other compensation from third parties.

Partnerships

Create new partnerships and expand existing relationships with LeafHouse.

We have the flexibility and scalability to collaboratively work towards your goals. The key benefit of working with our firm is to reduce fiduciary risk through rigorous investment oversight. LeafHouse has the organizational strength and technological platform necessary to meet the needs of our partners.

BROKER DEALERS

PLAN SPONSORS

FINANCIAL ADVISORS

RECORDKEEPERS

FUND MANAGERS

THIRD PARTY ADMINISTRATOR (TPA)

Do you want to reduce your fiduciary risk and associated workload to focus on participants? Do you want to integrate a flexible solution to help guide plan sponsors?

DISCOVER HOW LEAFHOUSE CAN BE THE RIGHT SOLUTION FOR YOU.

LEARN MORE

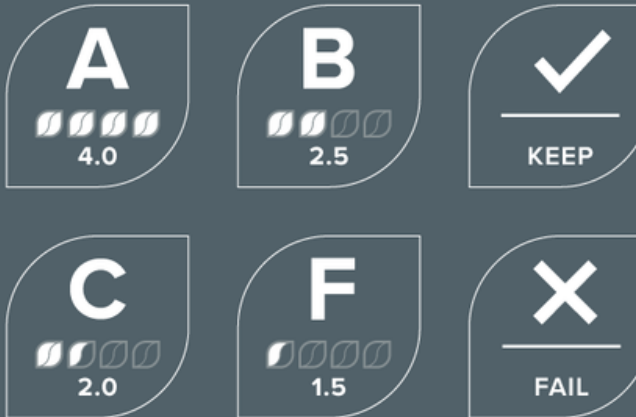
Grade Point Average® algorithm, which tracks a wide variety of quantitative and qualitative metrics.

LeafHouse creates smart and flexible packaged retirement solutions to better serve clients. We are a fiduciary who is able to offer individualized service due

to the agility of our team, investment knowledge, and technology.

Expand your offerings by leveraging our resources.

[LEARN MORE](#)



About Us

LeafHouse's two founding partners have been serving retirement plan clients together for over 20 years. As the retirement plan environment changes due to a shifting regulatory landscape and fluctuating markets, the fiduciary role becomes more complex.

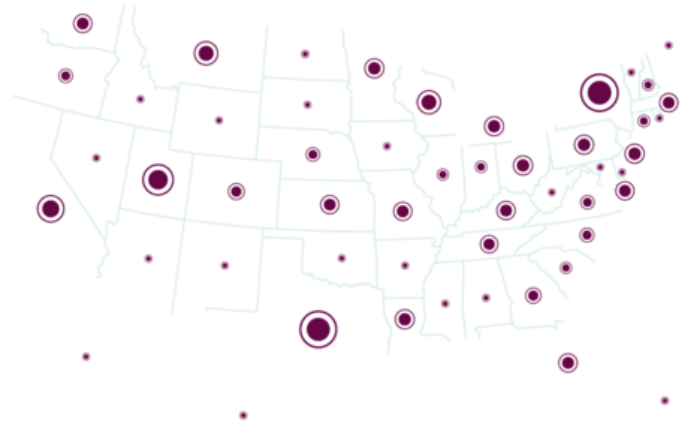
Our leadership team has demonstrated a unique ability to succeed in this dynamic environment. They have built the premier discretionary investment management firm for retirement

Our solution integrates technology and industry knowledge to provide a layer of protection to plan sponsors.

LeafHouse is DALBAR 3(38) Certified which provides additional third-party oversight. DALBAR, Inc. is the financial community's leading independent expert for evaluating and rating business practices, customer performance, product quality and services.

We have grown by
100% the past two
years consecutively.

Our business continues to flourish as we expand
our services and establish new partnerships.



5 B + 45 +

TOTAL
ASSETS

RECORDKEEPING
PLATFORMS

[LEARN MORE](#)



addition to dedication and diligence,
each team member contributes
individual core competencies.

LEARN MORE

Partner with a FlexFiduciary™ today.

As we uphold the fiduciary standard, our aim is to wholly align our interests
with those of our clients.

CONTACT US

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