Polaris Retirement Solutions

Overview

Polaris Retirement Solutions is a white-label retirement platform for banks that want to offer affordable and conflict-free 401(k), Roth 401(k), 403(b), and 457 plans to their SMBs and non-profit clients. Our modern solution encompasses all essential retirement plan duties, including record keeping, third party administration, custody, and investment management. Polaris Retirement Solutions makes it easy for banks to compliantly offer retirement plans and receive a non-interest revenue stream.

Features

We perform all essential retirement plan duties.

Plan Recordkeeping
Streamlined, ongoing plan reporting requirements, plan contributions, withdrawals, & individual participant account balances.

Third Party Administration
Polaris performs compliance testing, IRS Form 5500 filing, IRS-approved plan documents, participant disclosures, and more.

Investment Management
Combined automated & human advice; address employee questions; provide education; design an investment strategy that helps meet their needs. Our fund lineup offers best-in-class, low cost, passive and active funds.

Modern Technology
Polaris incorporates the latest in 401(k) technology. Participants have access to a streamlined on-boarding process, payroll integration, an easy-to-use dashboard, and an A.I. chat bot able to answer all types of questions 24/7.

Benefits

- Non-interest revenue stream
- Best in class solution
- Cross selling opportunities for personal & commercial banking products
- Clear value add for business owners
- Opportunity to receive a greater share of client's wallet
- Lead generation for future clients

Contact
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About
Polaris Portfolios is a digital wealth management firm that specializes in providing community and regional banks and credit unions with wealth management solutions.