



Providing You a Pathway to Success

Symetra Investment Services is an independent broker-dealer focused on retirement income and built for advisors who utilize a planning process. SIS offers superior back office support, as well as an extensive menu of tools and resources to grow and protect your business.

Advisor Solutions

We are committed to offering you leading advisory programs that give you tools to serve the unique needs of your clients. Whether you are an asset gatherer, an asset manager or financial planner, you need programs that allow you to customize your approach and leverage industry best technology. **SIS Advisor Solutions**, our comprehensive and integrated wealth management platform, enables you to consolidate your advisory business in one place. We give YOU the power to decide the best program for you and your client.

SIS Advisor Solutions provides a consolidated view of your advisory assets along with the resources you need to service and grow your practice. Take advantage of integrated research, portfolio tools and robust model management functionality.

Both you and your clients have online access to our powerful

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reporting platform. In addition to automatically generated, private labeled quarterly performance reports, our platform gives you the ability to run ad hoc reports with fully reconciled data at both the household and client level.

Support You Deserve

We offer business development consultants who evaluate where your business is today and where you envision it in the future, and then work one-on-one with you to put a plan in place to make it a reality. Our business development consultants will help you in specific areas that you want to grow or improve.

We have helped advisors make the transition to SIS year after year and have extensive experience in transitioning independent advisors as well as those choosing independence for the first time. We provide support and value from the moment you start the transition

conversation with us through the life of your partnership with SIS. You will have access to our transition team, as well as your own dedicated transition specialist. Based on your unique needs, SIS creates a customized individual plan for your business that includes a timeline, technology training, marketing consultation and the guidance needed to select investment platforms.

About Us

Founded in 1986 and located in Bellevue, Wash., SIS was established to support the needs of independent advisors and representatives throughout the United States. Advisors who affiliate with SIS offer a wide variety of products and fee-based advisory services to their clients. SIS is a wholly owned subsidiary of Symetra Financial Corporation, a publicly traded company (NYSE: SYA).

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