



Aspire

Aspire’s open-investment platform was designed for the internet- not adapted to it. Using the most advanced technologies, the platform weaves the best attributes of industry technology into the fabric of its system, creating a next generation retirement plan platform that blends reliability, simplicity, and integrity.

Contact Information

- **Phone:**
866-634-5873
- **Enrollment Website:**
www.aspireonline.com

Highlights

- Product Types: **Mutual Funds, Fixed Annuities**
- 403(b) Assets Under Management: **\$4B-6B**
- Aspire has **agreed** to offer and sell only products that met former Teacher Retirement System of Texas (TRS) Requirements as of 9/1/2019.
- Enrollment Options: **Online, Mail, Representative**

Product Information

- Mutual Funds- Direct Access

Management Fee: 0.15%

Other Fees: \$40/per participant annual fee

Loans: Yes

Loan Fixed Dollar Fee: \$100

Loan Interest Rate: Prime +1%

Who keeps the interest? **Client**

Other Transaction Fees: TPA Transfer or Exchange Fee, Wire Fee

- Mutual Funds- Platform Access

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- Fixed Annuity

Annual Fee: N/A

Surrender Charges/ Withdrawal Fees: N/A

Surrender Period: 5-7 Years

Loans: Yes

Loan Fixed Dollar Fee: \$100

Net Loan Interest Rate: 0-2%

Fixed Current Interest Rate: 2.5%

Guaranteed Interest Rate: 1%

Other Transaction Fees: TPA Transfer or Exchange Fee, Wire Fee

For more information, visit www.tasbo.org.

Note: The information in this document is based off a self-reported questionnaire submitted by the vendor.

Data as of 11/4/2020