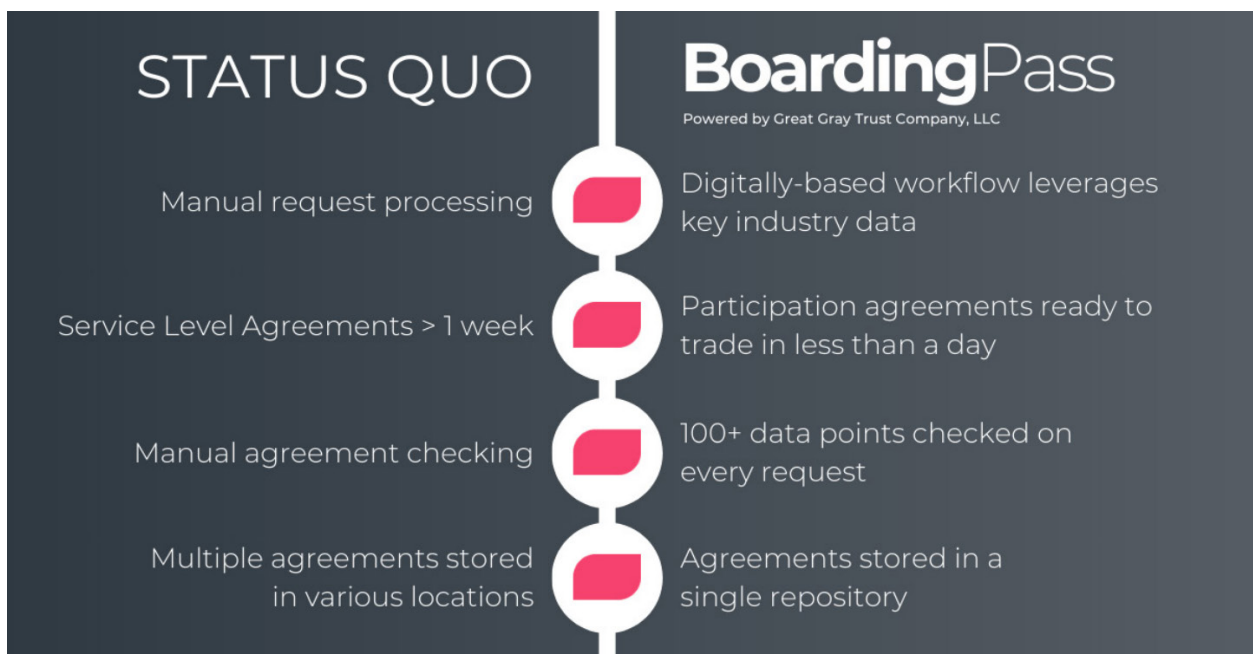




## Think Collective Investment Trusts (CITs) require too much work? BoardingPass is the solution.

Great Gray's BoardingPass solution digitizes the retirement plan onboarding process and creates a simplified experience for plan advisors and their clients to effectively manage participation agreements. BoardingPass is the first integrated processing technology for the retirement industry optimizing distribution by automating the previously manual process of fund onboarding.

More plan sponsors, advisors and recordkeepers are recognizing the importance of adding CITs as investment options to their plans. To make CITs more accessible to a larger portion of the U.S. workforce, and as a leading trustee in the CIT market, Great Gray continually innovates to make CIT choices more available and transparent.



1

## Make CIT onboarding your competitive advantage.

Great Gray continually innovates to make CIT choices more available and transparent.

As CITs continue to increase in popularity, streamlining the onboarding process remains at the forefront of Great Gray's focus. In fact, as of August 2024, CITs officially outpaced mutual funds as the most popular target-date vehicle. In total, CITs surpassed mutual funds by \$1.9 trillion. \*

BoardingPass has revolutionized how easy it is for the retirement industry to engage with CITs and provide these vehicles to plans.

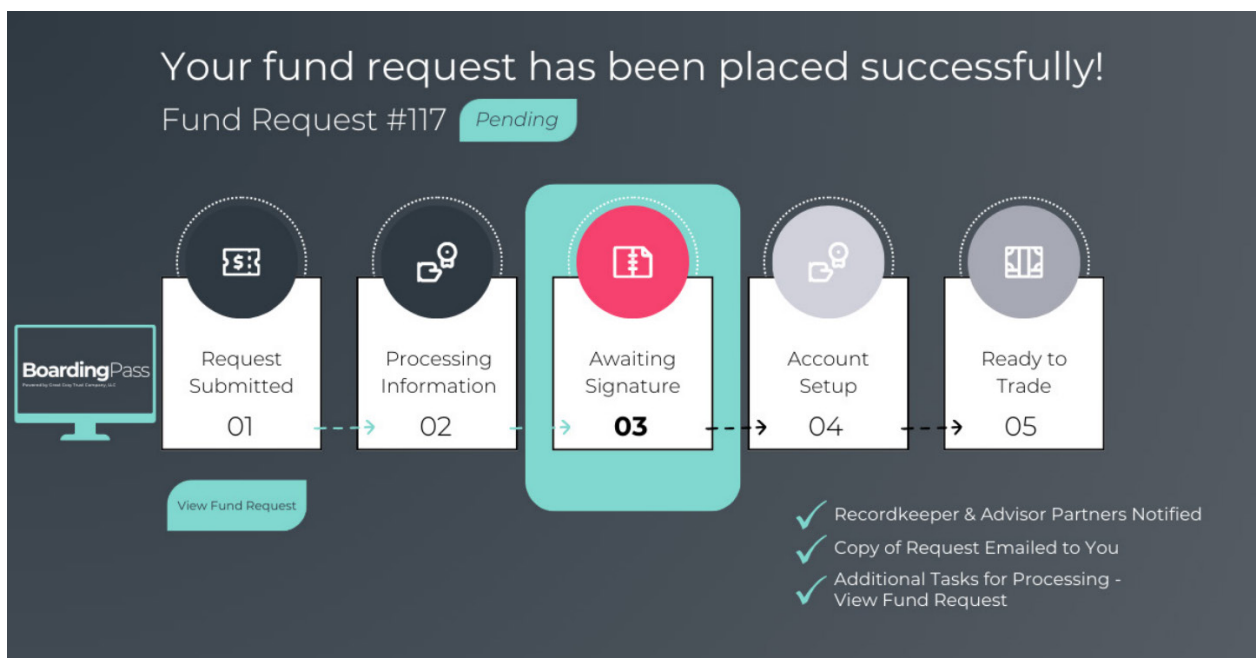
2

## Simplify your operations with one platform.

BoardingPass cuts out paperwork and lengthy approval times. Our secure platform lets sponsors, advisors, and recordkeepers complete tasks in just hours instead of days.

BoardingPass functions as a central hub for all plan information across numerous stakeholders.

The tool also utilizes an intuitive retail-like look and feel. This will speed up adoption, even for users who are less technologically inclined. Submit a fund request on-the-go, in between client meetings, in less than 5 minutes.



3

## Mitigate risks with process automation.

BoardingPass reduces mistakes and saves time. The tool automatically pulls key retirement plan data from the thousands of plans in the IRS Form 5500 database and prepopulates the proper form fields, special share classes, or specialty accounts to ensure accuracy.

These built-in automations allow you to focus more quickly on CIT fund selection. With the click of a mouse, fund requests are sent in real time to recordkeepers and plan sponsors.

\*Source: 401k Specialist: CITs Finally Surpass Mutual Funds as Most Popular Target-Date Vehicle  
<https://401kspecialistmag.com/cits-finally-surpass-mutual-funds-as-most-popular-target-date-vehicle/>

# See how BoardingPass can save you time and grow your practice.

Manual onboarding can take 7-10 business days. With BoardingPass, onboarding can take **under 3 days** to complete.

## Did you know



The average fund request completion time is only **4.5 minutes?**

*"BoardingPass has helped to improve the previous paperwork process. The tool helps to pre-fill the majority off the documents, making the overall (onboarding) process much more efficient."\*\**

**Kevin Kaiser**  
Sr. Investment Advisor



Save your firm time.  
[Request a demo](#)



Grow  
Confidently

**At Great Gray we are driven by growth.** In expanding and transforming retirement solutions to bring new possibilities to our clients. And to their clients.

Always listening, learning, innovating on top of a long-standing reputation for fiduciary strength and expertise. Creating what's next from a critical foundation of discipline and trust.

Empowering our industry, clients, and ourselves to **grow confidently.**

\*\* Kevin is an advisor to a plan that invested in a Great Gray collective fund and was not compensated for his statement.

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