

iJoin MAP & Income Partner Marketplace

iJoin's Managed Advice Program Marketplace uses our proprietary engine to estimate retirement income needs and align investments accordingly. Our partners combine this with their own risk and allocation models to deliver personalized glide paths.

Recordkeepers and Financial Advisors can leverage iJoin's managed advice technology to deliver a customized private label or proprietary AMA solution, built around the plan's existing fund lineup or designated investment models.

Partner	Availability	Product Name / Product Type	Private Label / Proprietary
 BlackRock	In market	LeafHouse-BlackRock Automated Personalized Portfolio™ AMA using plan's existing fund lineup or specified models <i>LeafHouse serves as 3(38) to the plan and/or participant.</i>	Private Label AMA
 CAPITAL GROUP®	In market	Target Date Plus powered by LeafHouse® Personalized Target Date Funds (TDFs) using blended Capital Group target date vintages <i>LeafHouse serves as 3(38) to the plan and/or participant.</i>	Private Label AMA
 fingage	In market	Automated Personalized Portfolios AMA using plan's existing fund lineup or specified models. <i>Fingage serves as 3(38) to the participant.</i>	Private Label AMA
 FRANKLIN TEMPLETON	In market	Personal Retirement Path AMA using plan's existing fund lineup <i>Franklin Templeton serves as 3(38) to the participant.</i>	Private Label AMA
 LEAFHOUSE	In market	LeafHouse-iJoin Automated Personalized Portfolio™ AMA using plan's existing fund lineup or specified models <i>LeafHouse serves as 3(38) to the plan and/or participant.</i>	Private Label AMA
 PGIM	In market	PGIM RetireWell™ AMA using plan's existing fund lineup <i>PGIM serves as 3(38) to the plan and/or participant.</i>	Private Label AMA
 iGPS + PIMCO	In market	iGPS Personalized Target Date (PTD) solution using blended PIMCO target date vintages <i>Nexus338 serves as 3(38) to the participant.</i>	Private Label AMA
 Prime Capital FINANCIAL	In market	AMA using plan's existing fund lineup or specified models Prime Capital serves as 3(38) to the plan and/or participant.	Private Label AMA
 stadion	In market	Storyline AMA using plan's existing fund lineup or specified models <i>Stadion serves as 3(38) to the participant.</i>	Private Label AMA
 STRATEGIC RETIREMENT PARTNERS	In market	AMA using plan's existing fund lineup or specified models Strategic Retirement Partners serves as 3(38) to the plan and/or participant.	Private Label AMA

Note: Managed advice providers may offer white-labeling flexibility on a case-by-case basis.

Updated August 2025. Please contact the iJoin team for more information at contact@iJoinsuccess.com.

iJoin's In-Plan Income Marketplace empowers advisors with flexible, cost-efficient guaranteed income options - all within a compliant, scalable model. It's a smarter, differentiated way to deliver lifetime income solutions that fit any plan strategy.



Partner	Availability	Product Name / Product Type	Insurance Carrier	Investment Vehicle Availability	Asset Liquidity	Post Income Activation	Custodian Availability
Allianz	In market	Allianz Lifetime Income+ Fixed Indexed Annuity (FIA) + Guaranteed Lifetime Withdrawal Benefit (GLWB) <i>Accumulation-based product</i>	Allianz	Any iJoin Private Label AMA, iGPS-PIMCO Self-Directed (DIY)	Full liquidity up to and post income election	Income is protected against market loss; assets remain investable	Matrix Mid-Atlantic Schwab
ARS	In market	State Street GTC Retirement Income Builder Fixed Indexed Annuity (FIA) + Guaranteed Lifetime Withdrawal Benefit (GLWB) <i>Accumulation-based product</i>	Athene Nationwide	Target Date Fund, Self-Directed (DIY)	Full liquidity up to and post income election	Income is protected against market loss; assets remain investable	Any
iGPS	Q3 2025	iGPS Lifetime Personalized Target Date (PTD) solution allocating to Deferred Income Annuity <i>Accumulation-based product</i>	Income Horizon by Pacific Life	iGPS-PIMCO PTDS	Full liquidity up to income election. Return of Premium and Cash Refund death benefits available both prior to and after income payments begin	Income units are protected against market loss, are accumulated with each participant contribution and can be converted to income, at which time they become illiquid and irrevocable. Full liquidity up to income election. Return of Premium and Cash Refund death benefits available both prior to and after income payments begin	Any
LEAFHOUSE	In market	LeafHouse APP powered by Dimensional Fund Advisors / State Street GTC Retirement Income Builder Fixed Indexed Annuity (FIA) + Guaranteed Lifetime Withdrawal Benefit (GLWB) <i>Accumulation-based product</i>	Athene Nationwide	LeafHouse AMA	Full liquidity up to and post income election	Income is protected against market loss; assets remain investable	Matrix Mid-Atlantic Schwab
nuveen <small>A TIAA Company</small>	In market	TIAA Nuveen Lifecycle Income (NLI) Target Date Fund that includes among other asset classes, the TIAA Secure Income Account (SIA) <i>Accumulation-based product</i>	TIAA	NLI Target Date Fund	Full liquidity up to income election (only applicable for the TIAA SIA allocation)	Income is protected against market loss; assets are converted to an annuity at income election and are illiquid and irrevocable (only applicable for the TIAA SIA allocation)	Matrix Schwab
PACIFIC LIFE	Q4 2025	Pacific Life Income Horizon Deferred Income Annuity <i>Accumulation-based product</i>	Pacific Life	Any iJoin Private Label AMA, Franklin Templeton AMA, iGPS-PIMCO	Full liquidity up to income election. Return of Premium and Cash Refund death benefits available both prior to and after income payments begin	Income units are protected against market loss, are accumulated with each participant contribution and can be converted to income, at which time they become illiquid and irrevocable. Full liquidity up to income election. Return of Premium and Cash Refund death benefits available both prior to and after income payments begin	Any
TIAA	Q4 2025	TIAA Secure Income Account (SIA) Fixed Income (or Indexed) Annuity <i>Accumulation-based product</i>	TIAA	Any iJoin Private Label AMA	Full liquidity up to income election	Income is protected against market loss; assets are converted to an annuity at income election and are illiquid and irrevocable	Matrix Schwab

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