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Rebecca Moore – 06/24/2008

Retirement plan consultant and recordkeeper Alliance Benefit Group has teamed up with FOLIOfn to offer advisers retirement plan system.

According to a release, Alliance Benefit Group Carolinas, LLC (ABG Carolinas), will be utilizing its defined contribution and defined benefit administrative services together with the custody and technological resources provided by FOLIOfn Institutional, a division of FOLIOfn. The two companies will offer customized, professionally managed retirement plan systems.

ABG Carolinas said several registered investment advisory firms are already on board and it is seeking to partner with more advisers who are looking for solutions outside the bundled mutual fund arena.

Alliance Benefit Group offers open architecture and full fee disclosure, while FOLIOfn Institutional provides Web-based technology which allows advisers to create customized "Folios"—baskets of securities one can buy, sell, exchange, update, or rebalance in a single transaction.

Advisers can purchase a group of stocks, exchange-traded funds (ETFs), or mutual funds and choose the weightings for those securities.

For more information, call ABG Carolinas at 704.523.4167.

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