



For Immediate Release

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PFG's Retirement Plan Center enables advisors to manage their clients' accounts without the need to roll over assets.

Phoenix, AZ, July 1, 2021 -- PFG Advisors, a Registered Investment Advisor, believes that all investors should be able to receive professional management in any account they wish, by the advisor of their choice. That's why it launched Retirement Plan Center, a platform that enables advisors to manage many of their clients' assets regardless of where they are held. This can be particularly valuable for accounts like 401(k)s, 403(b)s and 457s that are either unable to be moved or are best suited to be kept where they are.

"We are constantly researching new fintech options to help our advisors serve their clients in a more effective way. We were pleased to find a platform that provides the ability to manage many kinds of defined contribution plans," says Michael Prior, CEO of Priority Financial Group. "Following a successful pilot of our Retirement Plan Center in 2020, we introduced it to all of our advisors in early 2021. We believe the benefits to clients are substantial because it enables a more efficient way for our advisors to provide holistic advice."

Clients go through a one-time setup process where their account is connected securely, so their PFG Advisor has the proper access to make any necessary trades or to rebalance the portfolio. It is facilitated on a trusted platform used by some of the largest financial institutions in the world.

PFG's Retirement Plan Center is particularly fitting because it allows for more comprehensive planning and management, and the ability to see the big picture and act when necessary.

This new platform saves valuable time for both the client and advisor. Previously, it was cumbersome for advisors to ask their clients to manually collect and share their statements and disclosure forms, and to inform them each time the clients' employer changed fund managers within the plan. Now, advisors have the ability to proactively review these accounts in detail on an as-needed basis.

The Retirement Plan Center is made available through PFG Advisors, LLC, a Registered Investment Advisor (RIA).