



BLB&B Advisors, LLC oversees approximately \$2 billion in client assets as of 12/31/2021. With a 57-year history in the financial services industry, we offer a comprehensive suite of wealth and investment management services to a wide range of individual, non-profit, and corporate clients. As an SEC-registered investment advisor, BLB&B Advisors strives to provide its clients with high quality, low cost, and, when appropriate, tax efficient investment portfolios.

Retirement Plan Services

Typical clients include small and medium-sized businesses that want to offer robust, cost-efficient, customized, and user-friendly retirement plans to their employees while maximizing tax deferral options for owners.

Services provided to corporate clients include:

- Connecting business owners with other well-regarded plan designers, and custodians
- Helping to select a diverse group of mutual funds for plans based upon key criteria relating to performance, fees, management tenure, and third-party ratings
- Ongoing monitoring, reviewing, and updating of the mutual funds offered in plans
- Educating plan participants about the plan and the various investment options inside the plan, the need to save for retirement, and the importance of asset allocation
- Serving as an ongoing resource to plan participants should they have questions about the investment options or other plan features
- Working directly with individual plan participants to manage their sub-accounts on a discretionary basis

Our Retirement Planning Services for Business Owners

In addition to helping business owners offer well-run and low cost retirement plans to their employees, we also work closely with business owners to help them structure their personal retirement savings plans to maximize their ability to save for retirement in a tax-advantaged manner.

PLAN. INVEST. SUCCEED.®

www.BLBB.com
215.643.9100

Mailing address
P.O. Box 1010, Montgomeryville, PA 18936

Street address
103 Montgomery Avenue, Montgomeryville, PA 18936

Investment advisory services provided by BLBB Advisors, LLC ('BLBB'). BLBB is a Pennsylvania-based investment advisor registered with the Securities and Exchange Commission. More information on BLBB can be found on the SEC's investment adviser public disclosure site (adviserinfo.sec.gov) or on our website (www.BLBB.com). Registration as an investment advisor does not imply a certain level of skill or training.

2022.1122