



M FINANCIAL GROUP QUALIFIED PLANS

With 140 Member Firms, M Financial Group is one of the nation's leading financial services design and distribution companies. Focused on innovation, leadership, excellence, collaboration, and client advocacy, M Member Firms maintain an impressive and growing presence in the Qualified Plan arena.

Collectively, M Member Firms represent Qualified Plan assets in excess of \$16 billion with more than 2,600 plans and add an average of 200 new plans each year, representing \$1.4 billion of new assets under management annually.*

M Financial Group supports Member Firms by delivering a range of some of the best-in-class online advisor tools and resources for 401(k), 403(b), and 457 plans.

- Comprehensive Retirement Sales Support
- Compliance and Legal Support
- Investment Analytics, Plan and Advisor Benchmarking
- Marketing Resources
- Educational Opportunities



PLYBON & Associates, Inc.

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Plybon & Associates, Inc.

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Securities and Investment Advisory Services offered through M Holdings Securities, Inc., a Registered Broker/Dealer and Investment Advisor, Member FINRA/SIPC. Plybon & Associates, Inc. is independently owned and operated.

M Financial Group maintains several Partner Provider relationships with established leaders in the Qualified Plan market and can work with any provider a client and their advisor select.

As part of the M Community, and without compromising the advantages of independence, Member Firms benefit from the stability, scale, and support of M Financial Group's Qualified Plan strategies.

Member Firms successfully compete in an increasingly complex marketplace and service the dynamic and evolving needs of clients in an independent, consultative role.