



## **Pentegra, Social(k) and LeafHouse Financial Introduce Big Green Retirement Plan**

White Plains, NY March 4, 2019 -- Today, Pentegra, a leading provider of retirement planning and fiduciary outsourcing solutions, announced that it will partner with Social(k) and LeafHouse Financial to introduce the Big Green Retirement Plan. The Plan is an aggregate 401(k) retirement program with a focus on socially responsible investing. The plan offers comprehensive, bundled 401(k) plan services with full fiduciary outsourcing capabilities for companies who align themselves with the importance of socially responsible investing.

Unique in the industry today, the Plan allows an individual to consider his or her own closely held beliefs as part of making retirement investment choices, and offers plan sponsors a path toward simpler, safer, easier plan administration by outsourcing both the fiduciary administrator and investment roles.

Pentegra Senior Vice President and National Practice Leader, Pete Swisher said: "Until now green companies have had limited options for retirement plans that solely offer socially responsible investing alongside fully bundled 401(k) plan services and outsourced fiduciary responsibility. The Big Green Retirement Plan offers a tremendous market opportunity."

Pentegra will provide recordkeeping and 3(16) fiduciary administrator services for the program, enabling plan sponsors to minimize retirement plan fiduciary responsibility and liability and greatly reduce their internal administrative workload. With more than 75 years in the industry, Pentegra is one of the most experienced retirement plan fiduciaries in the nation.

LeafHouse Financial, a national investment fiduciary, will provide 3(38) discretionary investment fiduciary services for the plan. LeafHouse will evaluate, select, monitor and manage the Plan's SRI/ESG investment platform. "Environmental, social, and governance (ESG) factors are increasingly viewed as important elements in determining the financial performance of companies," said LeafHouse President Todd Kading.

"Our firm sees the trajectory of ESG investing rising, and believes the time is right to offer investment oversight to retirement plans. In our opinion, there is no better way to do this than to partner with two industry leaders, Pentegra and Social(k)." Kading added.

Social(k) Founder and Owner Rob Thomas said: "Today, more and more, employers and employees are interested in retirement plan investments that make a positive impact not only on their lives but also the lives of others. Interest in ESG/SRI investment options continues to grow, but 401(k) plans have had fiduciary concerns that have slowed the growth of these investment options for ERISA plans. The Big Green Retirement Plan offers a terrific solution."

Swisher added: "With a focus on oversight and fiduciary responsibility, all three organizations' values are closely aligned, so it made great sense for us to come together to offer the program. It's a win-win for clients as well as for our organizations as partners."

### **About Pentegra**

Pentegra is a leading provider of retirement planning and fiduciary outsourcing solutions to organizations nationwide. Founded by the Federal Home Loan Bank System in 1943, Pentegra offers a broad array of qualified and non-qualified retirement plan solutions and TPA services. For more information, go to [www.pentegra.com](http://www.pentegra.com).

### **About LeafHouse Financial**

LeafHouse Financial is a national discretionary investment manager for retirement plans. We are an independent and Flexible Fiduciary™ that aims to provide the maximum level of protection at a low cost. The firm acts in both a 3(21) and a 3(38) fiduciary capacity for a multitude of private and public plans. LeafHouse developed proprietary technology that is designed to prudently select, evaluate, and monitor investments that are solely in the best interests of plan participants and their beneficiaries.

LeafHouse is a registered investment advisor. Registration does not imply a certain level of skills or training. More information about the firm, including its investment strategies and objectives, can be found in our ADV Part 2, which is available, without charge, upon request. Our Form ADV contains information regarding LeafHouse's business practices and the backgrounds of our key personnel.

### **About Social(k)**

Founded in 2005, Social(k) has brought Environmental, Social and Governance (ESG) screened investment options to retirement plans for more than a decade. Its mission is to provide people the option to invest their money in conscionable companies that prioritize social and environmental responsibility *alongside* continued profit growth. In the past decade, Social(k) has invested more than \$150,000,000 on behalf of 7,500 people working for more than 300 organizations nationwide. Social(k) is a founding member of B Corporation, 1% For The Planet, Slow Money, and the Common Good Capitalism Movement and an advocate for responsible and sustainable businesses and organizations. For more information, go to [www.socialk.com](http://www.socialk.com).

###

**Media Contact: Rodi Rosensweig, [TheRodiCompany@gmail.com](mailto:TheRodiCompany@gmail.com); 203/270-8929**