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## Pentegra Reaches Out to Support Retail FAs

A recordkeeping TPA's investment arm is spreading their wings into the retail wealth management space for the first time.

Last week, **Scott Stone**, chief investment officer at **Pentegra**, **confirmed** that the White Plains, New York-based shop is partnering with New York City-based **IQCIO** to launch risk-managed model portfolios built out of ETFs. Stone describes Pentegra as focusing on "liability-driven investing."

The new products, called *Pentelligent Portfolios*, are not being sold directly to retail investors: instead, they are available through bank trust departments, affiliated RIAs and financial advisors, and others in wealth management, especially those looking to support smaller balance clients.

"We don't want to be in the retail advisory business," Stone tells **401kWire**. "We created a modeling system, using our processes, that allows financial advisors to reach down and more efficiently service those folks."

**Ted Potter**, managing partner at IQCIO, describes the role of his "technology-based RIA" as helping the Pentegra team develop retail versions of what they already offer to retirement plan clients.

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