Seamless Integration With Current Systems

Plus hundreds more...

FAQ

Is the Longevity Benefit insurance?

- No, the Longevity Benefit isn't insurance—it's built on a low-cost S&P 500 index fund and distributes more proceeds to investors who live longer.

Are there any medical requirements?

- No, it is accessible for all.

Can I supplement it with my own additional funding?

- Yes!

What if I leave my company?

- You keep your account, and you can continue funding it, but your employer will stop paying into it.

How is this taxed?

- As a standard brokerage account

What if I die before collecting the benefits?

- Unlike traditional pensions, your family or estate receives all—or the vast majority—of your deposits back. (Please refer to the disclosure for details.)

Can I withdraw cash?

- Yes, you can, but you miss out on the potential Savvly benefit if you cash out before age 80.

Disclosures, Assumptions, and Risks

The Longevity Benefit is offered through the Savvly Fund 3, a registered closed-end fund providing access to longevity-based financial benefits through a pooled investment structure. These offerings are not insurance, not bank deposits, and are not guaranteed. All investments involve risk, including the possible loss of principal. Payouts from the Savvly Fund 3 depend on investment performance and participant longevity and are not assured. Savvly Advisor, LLC is a registered investment adviser to the fund. Before investing, carefully review the Fund's prospectus, offering documents, and longevity benefit plan documentation, which contain important information about investment objectives, risks, charges, and expenses. ERISA Notice: If offered as an employer-sponsored plan, the Longevity Benefit is subject to the terms of the applicable plan documents. Eligibility, contributions, and benefits are determined under those plan documents and in accordance with applicable law, including ERISA. Nothing herein alters any rights or obligations under your employer's plan. This material is provided for informational purposes only and does not constitute an offer to sell, or a solicitation of an offer to buy, any security in any jurisdiction where such offer or solicitation would be unlawful. The Longevity Benefit and Savvly Fund 3 are not currently available for purchase. Additional information, including details on risks, fees, structure, and eligibility, is available at www.savvly.com/disclosure or by emailing info@savvly.com.

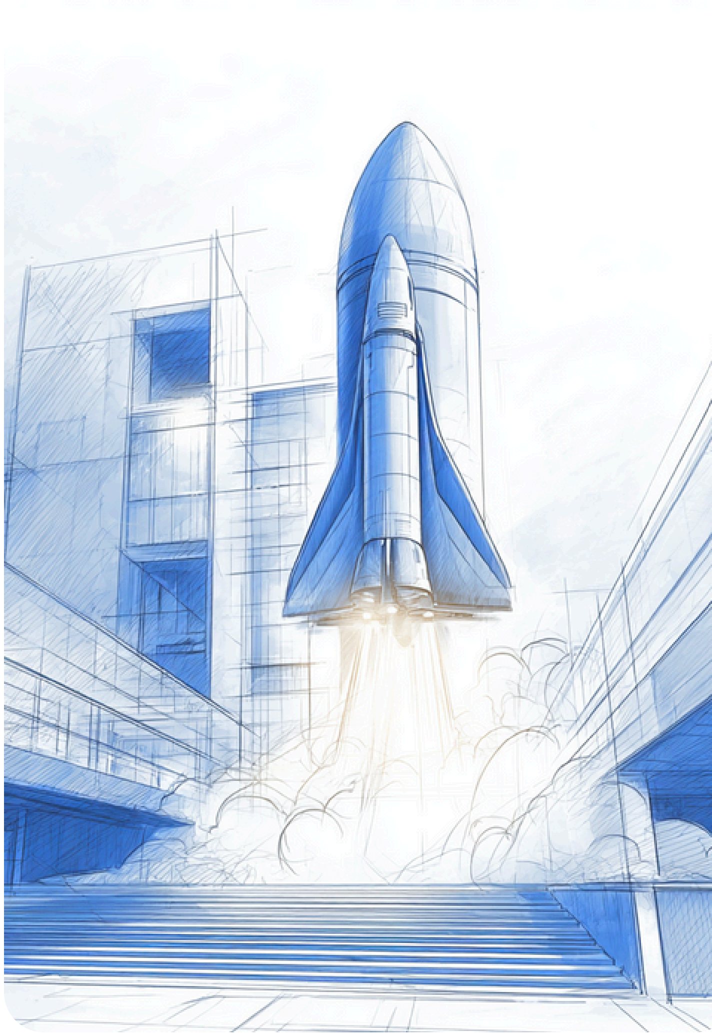
Learn more about Savvly

www.savvly.com

SAVVLY

A Longevity Benefit Elevates Retention

Savvly complements existing plans like 401(k)s and IRAs to help strengthen retention and boost financial well-being.



SAVVLY

The Future of Benefits Starts Here

Delayed retirements cost everyone more.

For employers, delayed retirements mean higher healthcare and payroll costs, stalled career growth for younger employees, and added strains on succession planning. Unwelcome turnover and attracting new talent become costly. **For retirees,** it spends their best retirement years doing something other than enjoying retirement.

Effortless and innovative.

Savvly is simple to integrate alongside existing benefits, with clear education materials and predictable costs. Offering longevity benefits positions your company as future-forward, with benefits that stand out.

Savvly allows for unlimited contributions

Traditional plans come with contribution caps. Savvly does not. Employees who have already maxed out their 401(k) or IRA can continue investing in their future.

The Savvly Experience

- Easy to integrate
- Portable and valuable
- Complements 401(k)s
- No contribution limits

SAVVLY

Introducing the Savvly Longevity Benefit

Savvly is designed to help employees retire with confidence, creating space for new talent and lowering long-term costs.

Investing for long-term growth

Savvly is a market-driven pooled fund that is invested in the S&P 500. Savvly invests in secure ETFs held by Vanguard, Fidelity, and BlackRock.

Boost current retirement packages

Savvly complements existing retirement plans like 401(k)s and IRAs by filling the gap in late life, with potential payouts at ages 80, 85, 90, and 95.

Accessible to all. Portable & valuable.

Unlike many traditional benefits, Savvly is accessible to employees across industries and income levels, helping you offer a solution that's both fair and future-focused.