Take action to move financial futures forward

The Corebridge difference

Working with K-12 educators, healthcare providers, universities, and government agencies across the country, Corebridge has years of experience supporting retirement plans just like yours. Through our community-based financial professionals we've also helped tens of thousands of employees and retirees plan and realize their retirement goals.

Our biggest differentiator relative to our competitors is that we employ, not contract, more than 1,100 full-time financial professionals and plan to add more in the next year to support our growth. Our locally based financial professionals work with your participants to help them achieve their retirement goals.

Expansive solutions to help secure financial futures

Our broad portfolio of products and services offers quality, choice, and flexibility. This means the institutions and financial and retirement professionals we partner with have solutions to help meet unique financial goals and situations.

Experiences and resources to drive action

We deliver new, impactful ways to help our partners build brighter, more secure financial futures.

Industry experts all-in on your success

We bring deep dedication and industry experience to every partnership. Our teams go above and beyond to support our partners, helping them navigate changing markets and address evolving financial needs with confidence.

Extending financial wellness to all

We're passionate about working together to lift communities and help bring financial health and opportunity within reach — no matter where one is in their life's journey.

FORTUNE 500 2025

Corebridge Financial made its debut on the Fortune 500 in June 2025, joining the prestigious list of the biggest U.S. companies by total revenue.[1] Being listed on the Fortune 500 signifies our standing among the largest and most influential companies in the world, highlighting our company's size, strength, and success.

Helping your employees take action

CORE service makes your job easier

Expert guidance provides better outcomes

Client-driven innovation elevates the experience

Your strength is in our numbers

More than
$380B
in assets under management and administration as of 03/31/26

Serving nearly
20,000
plan sponsors across 50 states

We are a
Top 5
retirement plan provider in K-12, higher education, healthcare, and government by assets[2]

More than
1,100
financial professionals serving local communities

[2] Source: LIMRA SRI not-for-profit Retirement Market Survey, data as of 12/31/25. Rank based on 16 reporting companies.

It starts with Corebridge Financial

At Corebridge Financial, we're all about bringing your retirement plan vision to life, by making your job easier and building a better future for your employees.

Realize your retirement plan vision with an action plan that gets you there.

Your action plan builds around your unique needs while encouraging financial wellness for your employees and retirees. The following pages outline a selection of key services we recommend to help you get started. Of course, your plan will be refined as we work together and learn more about your retirement plan requirements.

How do we support plan sponsors?

- Simplified plan **compliance and administrative services**
- **Extensive data analytics capabilities** to enhance your plan's health
- **Robust cybersecurity capabilities** to secure your valuable data

How do we support your employees and retirees?

- **Engaging communications** that reflect your culture and motivate action
- Smart, tech-enabled experiences with a **depth of digital tools and educational options** for personalized planning
- Connections to **local financial professionals** who provide personal guidance and planning

Engaging employees, encouraging action

We start with insights

We will take a hard look at your plan data to identify where employees are not taking full advantage of your plan benefits and develop a targeted strategy to better engage them. Our proprietary approach to analyzing your data and pinpointing specific locations, departments, and populations will help you unlock employee engagement. Our targeted approach focuses on core areas of influence to create positive momentum toward saving. With data leading our strategy, we report back to you with measurable outcomes and recommendations to continue building employee engagement and overall plan health.

You have a diverse mix of employees who have varying financial education needs and communication preferences. That's why we communicate with your employees through several channels to provide them with the information they need in the ways they prefer.

Broad-based financial education for all life stages

Corebridge University

In-person workshops

- **Webinar series**
- **Live virtual events**
- **On-demand webinars**

Focus on financial wellness

Give employees a path to financial confidence

Financial wellness is a journey. It's a state of mind and being, one where your finances and mental health are in check.

Among financially stressed employees, 57% said that finances are their top stressor and 33% are embarrassed to seek guidance on their finances.[3]

Our approach leads with action because action is the bridge from planning to outcomes, from today's financial needs to tomorrow's aspirations.

We'll help your employees:

Learn where they are

Interactive learning, broad-based education, and multichannel delivery make it possible.

Plan for their future

Financial planning sessions, discovery experiences, tools, and calculators can help set a course forward.

Act to achieve it

Programs, digital experiences, and products bring the future into focus with clearly defined actions.

Through a data-driven and personal approach to engagement, we will meet your employees where they are on their journey and help them achieve the feeling of being confident about their retirement.

[3] Source: PwC's 2026 Employee Financial Wellness Survey, January 2026.

Action planning through personalized online experience

Most people use their monthly income to budget expenses. That's why we put a special emphasis on helping participants think about their goals in the same way.

- **Balance and performance information** is front and center, and we put a significant focus on what's really important: estimated monthly income.

- **Personalized messages** appear at the top of the screen, helping participants see exactly where they stand.

- The **calculator** encourages immediate action and shows participants how to get — and stay — on track.

- **Engaging tools, calculators, and articles** from accredited news organizations provide perspectives on relevant financial topics.

- The **Student Loan Forgiveness Program** provides employees with an online student loan evaluation tool to determine eligibility for federal repayment and forgiveness programs.

Award-winning participant solutions

A participant website and mobile app deliver:

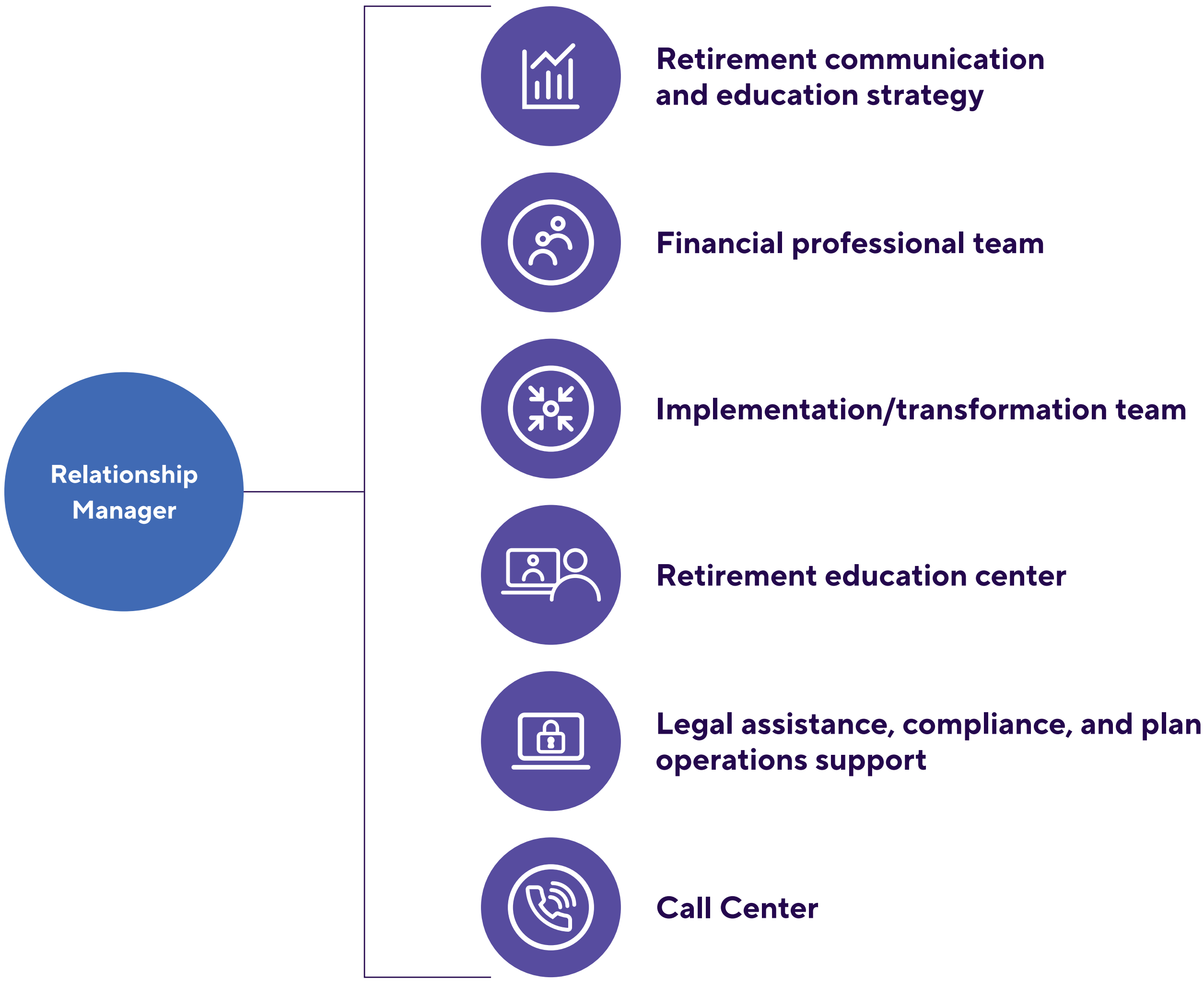
- Engaging design
- Intuitive and actionable approach
- Smart, dynamic results focused on future income
- Security through multifactor authentication and biometrics
- Corebridge Mobile for iPad®, iPhone® or Android™ phones

DALBAR rated the Corebridge Financial website "excellent" for mobile optimization[4]

We are proud to have been awarded the *DALBAR Pyramid of Communications Excellence* for our participant web experience in 2025

[4] "DALBAR's 2024 Mobile InSIGHT Review: Top Financial Firms Setting the Standard in Mobile Optimization," DALBAR Press Release, February 3, 2025.

Coordinating a team approach



A single point of accountability

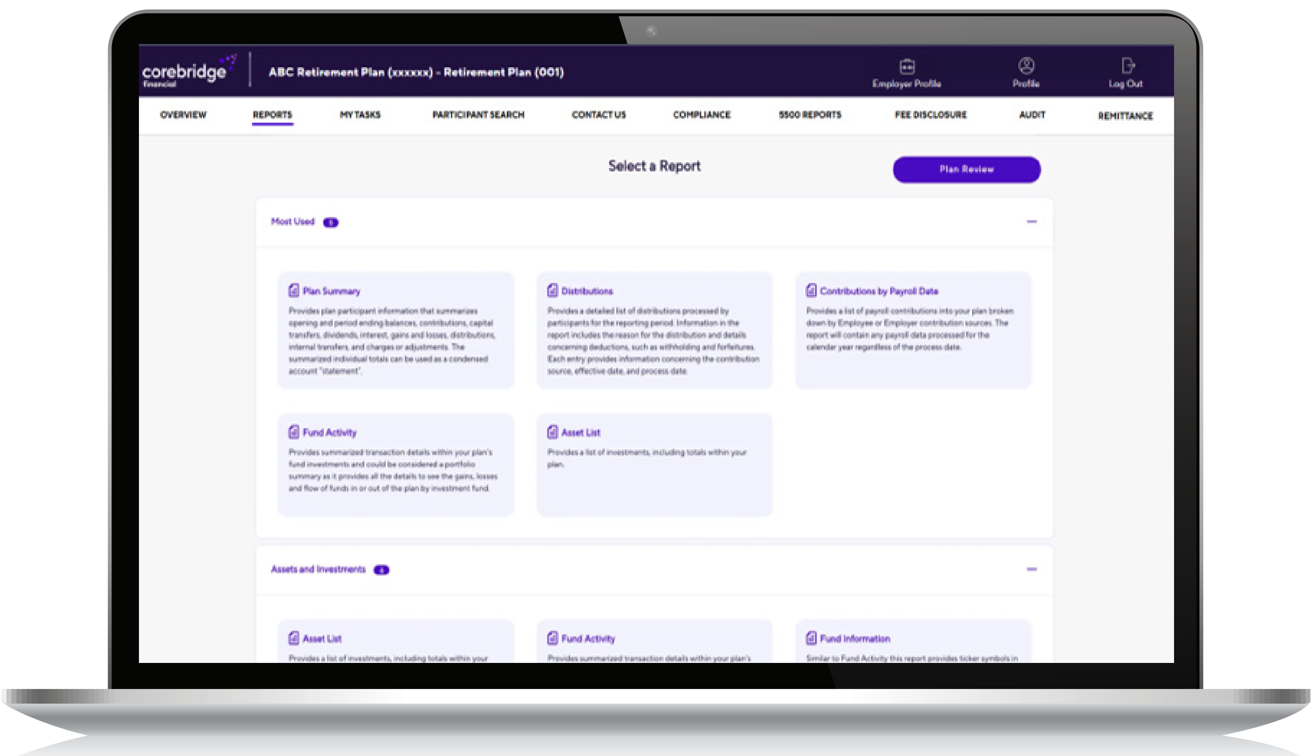
Once your plan is transitioned, we will get to work on the day-to-day administration. A point person will be responsible for organizing and delivering all of our resources to you. Corebridge provides an unwavering commitment from all team members to always put our clients first.

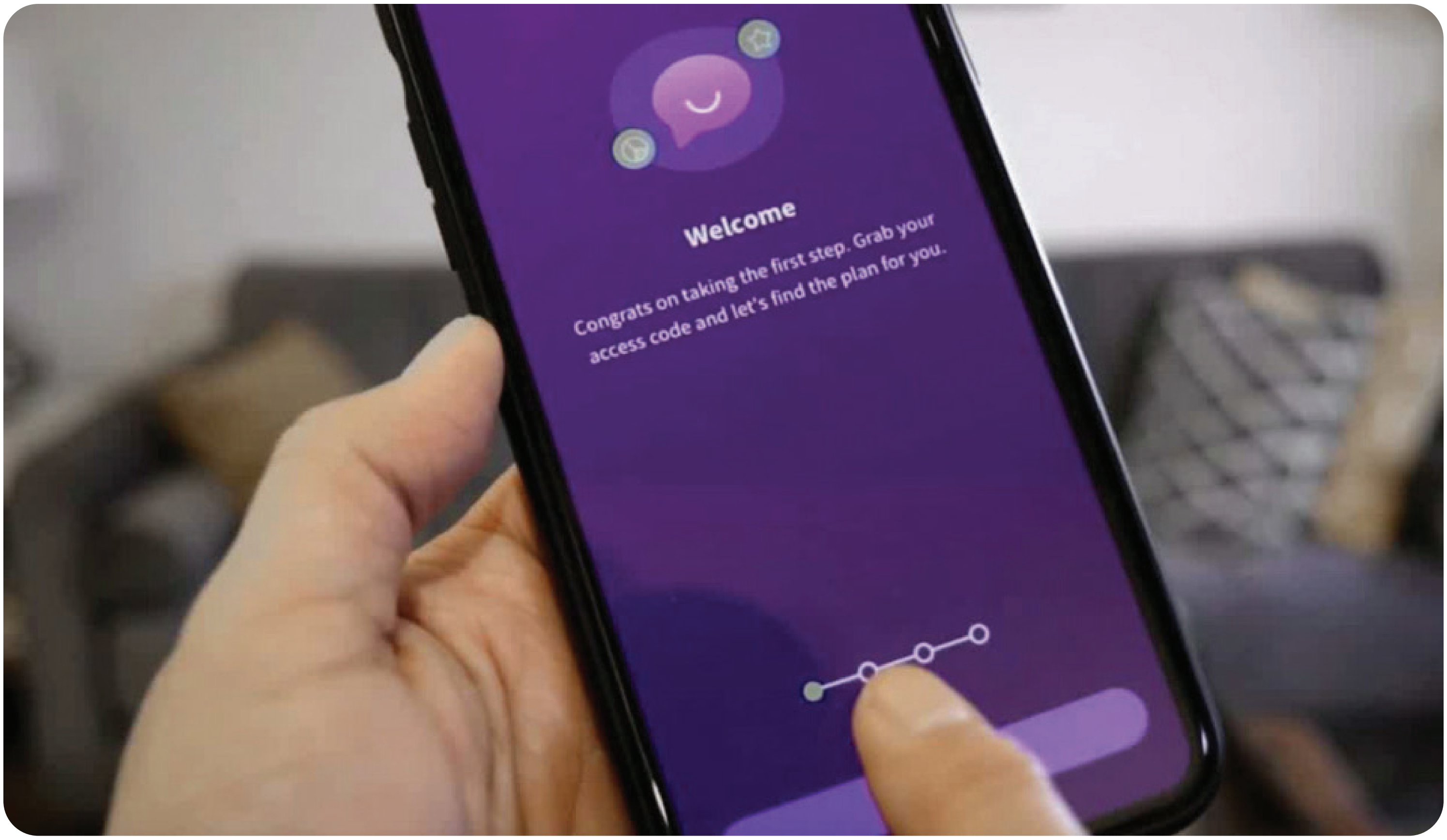
SponsorFIT®—a smarter way to manage your plan

SponsorFIT, our self-service plan sponsor portal, is designed to help keep you in control. By making plan administration easier, you'll be able to help your employees achieve the futures they envision.

The benefits of using SponsorFIT:

- Historical view of your plan with exciting graphics
- Assess plan health by highlighting industry benchmarks
- More customization options in addition to the standard reports
- Deeper participant-level data and ability to update participant information





Protecting your data

Protecting your plan information is extremely important to Corebridge. This is why threat intelligence plays a crucial role in our relationship with your organization. And it's why we use advanced defense methods to detect, isolate, and remove these threats. We have an entire group within our organization dedicated to these efforts.

We recommend following these best practices:

- Register your online account at **corebridgefinancial.com/retire**
- Sign up for e-Delivery for fast, secure access to important documents
- Review account information regularly
- Notify Corebridge of any concerns within 90 days

Multifactor authentication

Clients receive a security code by text or email when engaging our digital tools or call center to verify identity of person accessing client accounts.

Biometrics for app platforms

Both finger and facial print biometrics are available on our mobile app platforms to help clients quickly and securely access account information from their personal devices.

Telephony authentication

Recognition technology helps us easily identify callers to help decrease verification processing while protecting personal client information.

Elder and vulnerable client care

Our financial professionals and call center staff are educated on how to identify and escalate possible fraud attempts through our Elder and Vulnerable Client Care Portal.

Account protection is a partnership. We believe participants play a role in protecting their accounts by taking appropriate actions and using safe practices. As part of our Account Protection Responsibility, in the event assets are taken from an account through no fault of the participant, we will restore the full value to make their account whole. We offer our plan sponsors a robust education program to help employees understand the importance of using safe practices to defend and protect against cyber attacks and fraud attempts.

Action is everything.

Call 1.888.478.7020 | Click corebridgefinancial.com/retire

Annuities are issued by **The Variable Annuity Life Insurance Company** (VALIC), Houston, TX or **The United States Life Insurance Company in the City of New York** (USL), New York, NY. Guarantees are backed by the claims-paying ability of the issuing insurance company and each company is responsible for the financial obligations of its products. VALIC does not solicit, issue, or deliver policies or contracts in the state of New York. Securities products are distributed by Corebridge Capital Services, Inc., member FINRA.

Securities and investment advisory services offered through VALIC Financial Advisors, Inc., member FINRA, SIPC and an SEC-registered investment advisor.

VALIC Retirement Services Company (VRSCO) provides retirement plan recordkeeping and related services, and is the transfer agent for certain affiliated variable investment options.

VALIC Trust Company Inc. provides plan trust and custodial services.

Service Provider Agreements will be entered into with either VALIC and/or VRSCO depending on the investment arrangement(s). Trust Agreements will be entered into with VALIC Trust Company Inc., serving as a non-bank custodian or directed trustee.

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Corebridge Retirement Services, Corebridge Financial and Corebridge are marketing names used by these companies.

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