



Important Documents

What is happening?

Voya Financial has expanded our relationship with Morningstar to offer a new solution for managed accounts and online advice. We're pleased to announce that Voya Retirement Advisors, LLC, powered by Morningstar Investment Management LLC., will be our new advisory services solution.

What does this mean for you?

Voya Retirement Advisors, LLC (VRA) will serve as the registered investment advisor and 3(21) and 3(38) fiduciary - so VRA will be an investment advisor and investment manager for your managed accounts and online advice. Under this program, Morningstar Investment Management LLC will act as independent "financial expert" (as defined in the Department of Labor's Advisory Opinion 2001-09A) and will provide the technology and methodology for program execution.

Benefits of the change

Direct alignment between the recordkeeping and the advisory services experience for you and participants.

Improved participant support for managed accounts and online advice from our VRA Investment Advisor Representatives, available by calling your plan's toll free plan information line.

Consistency in participant communications and digital experience.

Increased opportunity to improve participant and plan outcomes.

No changes to current program fees for your plan(s).

What do you need to do?

Review the [information](#) in the package mailed to you recently

Fill in your name and title below prior to providing consent

Plan Representative Name

Plan Representative Title

YES, I CONSENT

By clicking “YES, I CONSENT” above, STATE OF DELAWARE acknowledges receipt of the [Notice of Assignment and VRA’s Disclosure Statement](#) and agrees to the terms detailed in these documents. This includes assignment of its advisory services agreement with Morningstar Investment Management LLC to Voya Retirement Advisors, LLC. If you do not respond via this web site or contact your Voya relationship manager with any questions by June 16, 2023, Morningstar Investment Management LLC and VRA will deem you have consented to the assignment, and VRA will act as your plan’s fiduciary for in-plan participant advice effective July 1, 2023.

© 2023 Voya Services Company. All rights reserved.
CN2715825_0124

[Terms of Service](#) | [Privacy](#)