

defined contribution & savings plan *alert*

Critical Intelligence for the Mutual Fund
and Defined Contribution Communities

Incorporating *fund marketing alert* and *defined contribution news*

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Oakland TPA Preps CIFs

Oakland, California-based WESPAC will add a suite of risk-adjusted collective investment funds in mid-February. The funds will replace the Russell LifePoint funds the firm now uses as its target risk default investment option. WESPAC's funds will apply investment methods the firm already uses in its managed portfolios for high-net-worth clients.

Nelson Chia, co-president, told DCSPA the approach includes analysis of both strong sectors and stocks and allows for more tactical investing versus the Russell funds.

The five funds have varying amounts of equity exposure, ranging from 100% to 20%. Investment in the funds would be ranging from 100% to 20%. Investment in the funds would be open to all plans using WESPAC's platform.

The switch will be mandatory for plans where WESPAC.