
Jefferson National Offers DFA Funds

By Editor Test *Wed, Sep 8, 2010*

Jefferson National's Monument Advisor VA contract offers more than 250 investment options, or five times the number offered by most VAs, the company said.

[Jefferson National](#), issuer a flat \$20/month insurance fee variable annuity, now offers access to funds from [Dimensional Fund Advisors](#). Dimensional's funds are available tax-deferred to financial advisors who use Jefferson National's Monument Advisor, the number one RIA-sold VA for three consecutive years according to [Morningstar VARDS](#) Data.

Through the new offering, advisors can access six funds:

- VA Global Bond Portfolio
- VA US Targeted Value Portfolio
- VA US Large Value Portfolio
- VA International Small Portfolio
- VA Short-Term Fixed Portfolio
- VA International Value Portfolio

Jefferson National's Monument Advisor offers more than 250 investment options, or five times the number offered by most VAs, the company said, including the most subaccounts with the Five Star and Four Star Morningstar Rating for a second consecutive year.

According to [Cerulli Associates](#), the fee-based advisory market is one of the fastest-growing segments in the financial industry, with assets topping more than \$7.2 trillion as of 2008, and more than 65% of brokers surveyed said they would be interested in going independent.

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