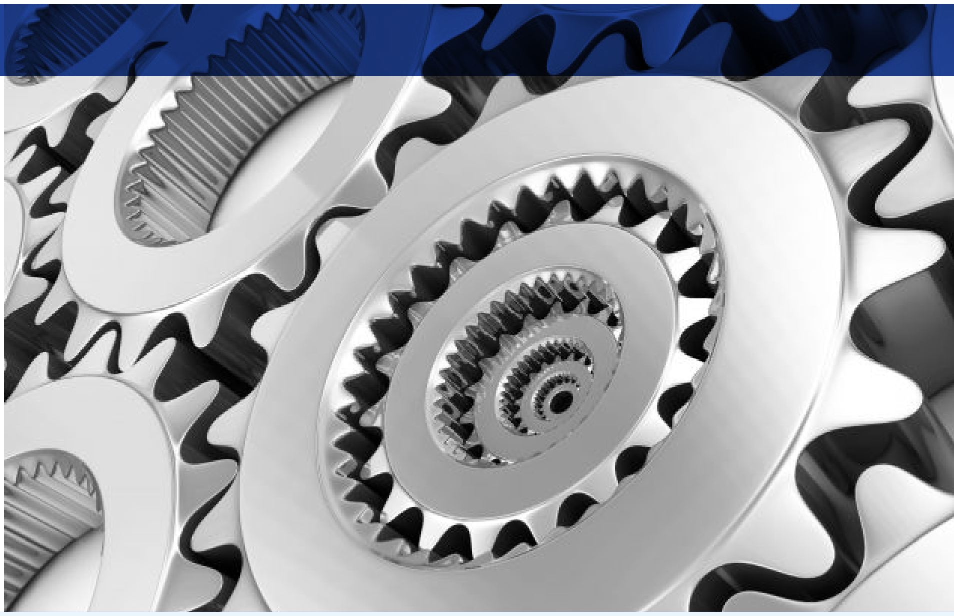
The Plan Advocate at Independence Square Advisors

ABOUT US



OUR MISSION

We strive to minimize a plan sponsor's efforts in running a successful retirement program, while helping to manage fiduciary liabilities and empowering employees through financial wellness programs.

THE PLAN ADVOCATE® TEAM

They act as co-fiduciaries and/or fiduciary investment managers (ERISA 3-21 or ERISA 3-38). You know your employees and company best. The Plan Advocate® team will develop a service plan customized to you and your organizational needs.

INDEPENDENCE SQUARE ADVISORS

The Plan Advocate® Team focuses exclusively on retirement plans at Independence Square Advisors, which is an independent retirement plan and wealth management services firm powered by LPL Financial as their broker/dealer.

LPL RETIREMENT PARTNERS

LPL Retirement Partners is the retirement plan-focused division of LPL Financial, the nation's largest independent broker/dealer.*

Joseph A. Lapps, CRPS®, AIF®
Joe is a Partner, Chartered Retirement Plan Specialist, and Co-Founder of The Plan Advocate® at Independence Square Advisors. He has over 31 years of experience as a financial advisor, 22 years of that, with Morgan Stanley Smith Barney, leaving as a Corporate Retirement Director.

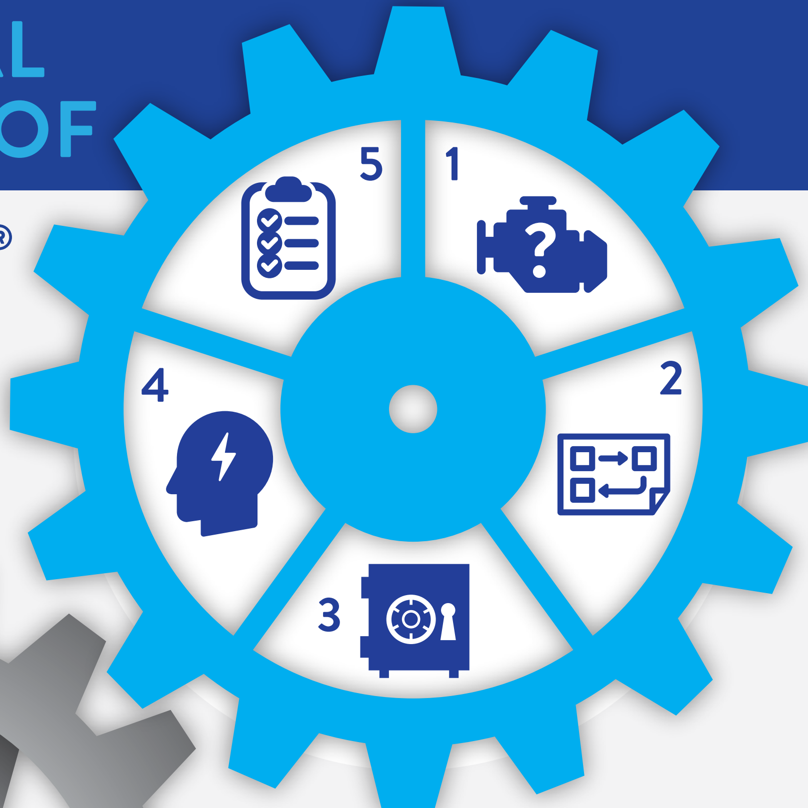
Jordan C. Norley, AIF®, CFS®, CPFA®
Jordan is a Partner, Certified Plan Fiduciary Advisor, and Co-Founder of The Plan Advocate® at Independence Square Advisors. He has over 13 years of experience focusing on retirement plan strategies for businesses and executives. A graduate from Penn State, Jordan has served West Chester as The Mayor and President of Council.

Joseph B. Elliott, CFP®, AIF®
Joe is the Managing Partner and Founder of Independence Square Advisors. He has over 23 years of experience in providing business and personal clients with their retirement plan needs. Previously Joe was managing a 60-person financial firm in Media, PA and holds a finance degree from James Madison University.

* As reported by Financial Planning magazine, June 1996-2019, based on total revenue.

THE 5 ESSENTIAL COMPONENTS OF

The Plan Advocate® Process to Get Your Plan in Gear:



1. **PLAN DIAGNOSTIC:**
   Benchmark & Analyze Your Plan
2. **PLAN BLUEPRINT:**
   Layout Your Service Model for the Year
3. **FIDUCIARY STANDARD:**
   Define, Monitor & Document Your Plan
4. **EMPOWERED EMPLOYEE:**
   Engage, Educate & Strive to Improve Employee Financial Wellness
5. **ANNUAL PLAN EVALUATION:**
   Review, Evaluate & Adjust Your Plan

HOW DOES YOUR PLAN COMPARE?

Contact **The Plan Advocate®** for a No Obligation Plan Diagnostic.

Email: 401k@indsquare.com

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