

The Plan Advocate

at



The
Philadelphia
Group

GET YOUR PLAN IN GEAR

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.



Joseph A. Lapps, CRPS®, AIF®

Joe is a Partner and Retirement Plan Specialist at The Philadelphia Group and Co-Founder of The Plan Advocate®. He has over 25 years of experience as a financial advisor, 22 years of that, with Morgan Stanley Smith Barney, leaving as a Corporate Retirement Director.

THE PHILADELPHIA GROUP

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



Jordan C. Norley, CFS®, AIF®, CPFA®

Jordan is a Partner and Retirement Plan Specialist with The Philadelphia Group and Co-Founder of The Plan Advocate®. He has over 10 years of experience focusing on retirement plan strategies for businesses and executives.

LPL RETIREMENT PARTNERS

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



Joe Elliott, CFP®, AIF®

Joe Elliott is the Managing Partner and Founder of The Philadelphia Group. He has over 20 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. He has a finance degree from James Madison University.

* As reported by Financial Planning magazine, June 1996-2016, based on total revenue.

** As reported by Plan Sponsor magazine, October 2015, based on number of plan clients.

The 5 Essential Components of The Plan Advocate® Process:



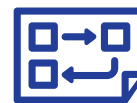
THE PLAN DIAGNOSTIC

Benchmark & Analyze
Your Plan



THE ANNUAL EVALUATION

Review,
Evaluate
& Adjust



THE PLAN BLUEPRINT

Layout
Service Plan
for the Year



THE EMPOWERED EMPLOYEE

Engage, Educate & Strive
to Improve Productivity
Through Financial
Wellness Programs



THE FIDUCIARY STANDARD

Define, Monitor
& Document



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

Email: 401k@thephiladelphiagroup.com

THE PLAN ADVOCATE® TEAM AT THE PHILADELPHIA GROUP

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