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.

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.

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.**

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.

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.

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.

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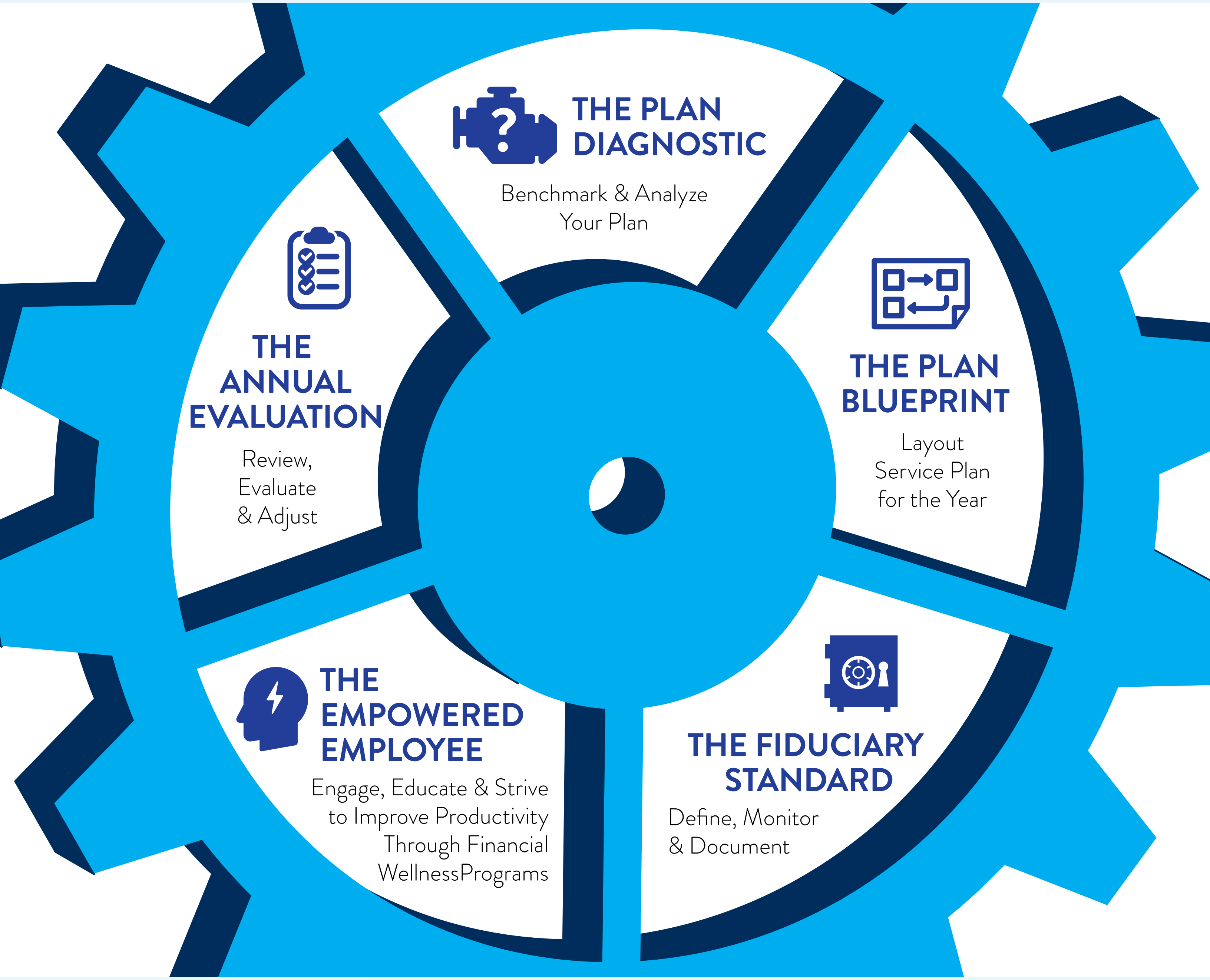
* As reported by Financial Planning magazine, June 1996-2016, based on total revenue.
** As reported by Plan Sponsor magazine, October 2015, based on number of plan clients.

The Philadelphia Group

The 5 Essential Components of The Plan Advocate® Process:



Contact **The Plan Advocate®** today for a No Obligation Plan Diagnostic.
Email: 401k@thephiladelphiagroup.com

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