



401(K) PLANS

Madison Park Capital Advisors is proud to offer 401(k) plans as part of our suite of services to small and medium-sized businesses. 401(k) plans offer employers a fantastic tool to **recruit, reward, and retain** the best employees within today's competitive labor markets. In addition, they provide employees with a trusted, tax-favored means of saving for retirement.

Parties to every plan

PLAN SPONSOR
Employer

PLAN PARTICIPANT
Employee

FINANCIAL ADVISOR
Madison Park Capital Advisors

FUND COMPANY /
RECORDKEEPER

THIRD PARTY
ADMINISTRATOR

So how does this all work?

UNDERSTAND
your
NEEDS &
VALUES

SELECT
trusted
PARTNERS

CHOOSE
a great mix of
INVESTMENTS

CONSISTENT,
PERSONALIZED
service

Madison Park Capital Advisors will meet with you to gain a better understanding of **your goals and values** around offering a retirement plan, and determine whether a 401(k) is the right choice for you. Whether you are changing plan providers or offering a plan for the first time, we will help you define these goals and then find a plan that best matches them.

We work with a number of plan providers and third party administrators (TPAs), all of which we selected as a reflection of their **superior levels of product quality and service** within their areas of expertise. Based on your goals and values, we will identify the right mix of service providers to deliver a superior 401(k) experience to you and your employees.

Once the service providers are identified, as the financial advisor, we will work with you to determine the **right mix of investment options**. Our goal here is to help you provide a superior set of diverse investment opportunities while honoring your fiduciary duty as the plan sponsor.

We then work with each employee to provide **personalized investment advice** as they choose the investment mix most suited to their needs and risk tolerance. This is a dynamic process, and so we routinely consult with all plan participants to ensure their investment choices remain in line with their financial situation and their long-term retirement goals.

our partners



DISCLAIMER

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