

The background features a stylized landscape with rolling green hills in various shades of green. A winding road with a yellow center line and dark grey sides curves through the hills. At the top, a bright sun with yellow rays is partially obscured by a white banner containing the title. The sky is a light blue gradient.

Retirement Plan Solutions

Halcyon Wealth Advisors
B. Lynn Clark, ChFC

Focus

Results - not procedures.

As an independent, retirement advisory practice, we report to no one but our clients. We are not obligated to use proprietary products. At Halcyon Wealth Advisors we have 25 years of 401(k) experience and 47 years of combined intellectual capital.

Our expertise is in helping you achieve the results you want, without getting you bogged down in complex rules and regulations. We sit on your side of the negotiating table to find the right retirement plan solution for your company.

We have skin in the game (fiduciary responsibility.)

Once your plan is implemented, we monitor it regularly to make sure it continues to meet your company's goals and objectives over time. That leaves you free to focus on what you do best...

running your business.

Balance

Minimizing costs and creating value through...

- Plan-level Investment Advice
- Employee Education
- Fiduciary Oversight
- Plan Design Strategies / Analysis
- Manage Vendor Relationships

Simplicity

We do the work for you.

As financial professionals, we will take you through our evolutionary six-step process to develop a retirement plan that meets your company's needs. We will...

- evaluate your current retirement plan, including places where you may be paying hidden and unnecessary fees;
- help find ways to maximize tax benefits;
- help protect you and your company's fiduciaries from unnecessary litigation;
- write an RFP and analyze proposals to make sure you obtain the best solution;
- monitor your plan investments on a quarterly or semi-annual basis.

Our Solution

No one knows your business like you do. Your ability to focus on your enterprise has made you the success you are today.

Trouble is, there's a lot to running a successful business that has little to do with the core business you're managing, but is still critically important to your overall long-term success. Your company's retirement plan is a perfect example.

Our process is built around three principles:
simplicity, **focus**, and **balance**.

In addition to these principles, we will work with you to minimize costs and create exceptional value.

Together, we can educate, excite, and motivate your employees to participate.

B. Lynn Clark, ChFC

Our Retirement Plan Solution

Six steps to building a stronger retirement plan for your company

Step 1: Evaluation

We provide you with an evaluation of your company's retirement plan objectives and concerns and an analysis of other plan solutions.

Step 2: Optimizer

Maximizing the tax benefits of your plan for both company as well as the employees, utilizing current plan design options.

Step 3: Fiduciary Shield

We help control risk by developing a formal investment policy statement and establishing clear criteria for selecting and monitoring investment managers.

Step 4: RFP Process

We'll walk you through the RFP process, manage information, analyze and review proposals, and guide you in making informed and knowledgeable decisions.

Step 5: Education

We enroll your employees and educate them on the benefits of their new program. We'll ensure their satisfaction through ongoing education.

Step 6: Monitor

We'll manage the health and welfare of your retirement plan on an ongoing basis, advising you on regulatory changes, investment advice, and fiduciary oversight.

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