



# SYMPHONY

Retirement Partners, LLC



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**Fact:** ERISA plan fiduciaries have an obligation to determine whether they have the internal expertise in prudent plan governance **or engage those who would be considered “prudent experts” to assist them in this area.** You will be choosing your closest and most trusted ally to protect the best interests of your plan's participants, and therefore, to manage your monumental fiduciary liability as a plan sponsor.

## Current Position

John is the Managing Partner and Founder of Symphony Retirement Partners, LLC

## Specialization

At Symphony Retirement Partners, LLC we help employers like you manage costs, monitor performance, understand and implement fiduciary practices, and assist plan participants with their retirement planning goals.

Sponsoring a 401(k) plan is more than just time consuming and complicated, it also places legal responsibilities on you as the plan's fiduciary.

Given the expertise and specialization necessary to manage your plan, many plan sponsors like you choose to employ the services of an experienced advisor.

## I Can Help You Navigate Your Responsibilities

1. Evaluating and Selecting an Appropriate Provider
2. Resources for Selecting and Monitoring Investments
3. Improving Retirement Plan Participation
4. Ongoing Plan Management
5. Plan Design To Meet Organizational Needs
6. Fiduciary Support

## Independent Counsel

Symphony Retirement Partners, LLC is an independent Registered Investment Advisory firm. We do not offer a proprietary “in-house” 401(k) plan. We work directly for you and are compensated via a fee for our retirement plan consulting services.

## Professional Industry Designations

- Accredited Investment Fiduciary (AIF®)
- Chartered Retirement Plan Specialist (CRPS®)
- Certified in Long Term Care (CLTC®)

## Experience

- Number of years: 27
- Plan size: Start up plans up to \$50 million in 401(k) assets
- Employee size: 2 employees up to 1,000.
- Employer type: For profit and not-for-profit entities