

# Retirement Plan Consulting Services

*Holistic and Client Focused*



## Leadership

Filtering through the nearly endless choices in retirement programs can be overwhelming, both for your organization and for your employees. It takes a big-picture view of the future, a deep understanding of the retirement plan environment and the right perspective.

For employers and employees alike, the goal should be overall financial wellness. That's the key to a well-planned retirement strategy for your organization and your employees.

## Independent & Comprehensive

CecilCo teams provide comprehensive plan design consulting solutions—401(k), 403(b), profit sharing, non-qualified—to help your organization ensure the financial well-being of your employees. And since we're not provider-aligned, you get guidance from consultants you know, and research and market insights that are customized to your goals.

## Experienced & Strategic

Working with CecilCo Retirement Plan Consulting means taking advantage of our over **37 years** of insights and experience. We work closely with clients, using a strategy-first consultative process that surfaces issues and leads to real-world solutions.

## Our Proactive Consulting Focus includes:

- Fiduciary Governance and Training
- Plan Design & Document Management
- Plan Participation & Operation Evaluation
- Regulatory Compliance and Correction Solutions Programs
- Merger & Acquisition Consulting

## Reduce Risk, Build Confidence

Learn how a well-planned fiduciary management process and a hands-on, consultative approach can mitigate your risk as a plan sponsor, prepare your workforce for retirement and improve confidence across your organization



Elevate Your 401k

Insightful Design, Rigorous Processes and Loyal Collaboration

14881 Quorum Dr. Suite 340, Dallas, TX 75254  
800.795.401k 972.239.4059 [www.cecilco.com](http://www.cecilco.com)

