

RETIREMENT PLAN MANAGEMENT

10 

BCM Facilitates ERISA Compliance intended to protect plan sponsors and simplify participant success using comprehensive plan reporting.

1 

Interview Plan Sponsor to refine unique goals, success criteria, & mission statement.

2  X-RAY

Identify Strategies and Improvement Opportunities using The BCM Plan X-Ray™.

- Homeostatic Allocation™
- Participant Education Level
- Fees
- Investment Quality
- Fiduciary Compliance

3 

Improvement Rx™ provides a prescription for specific changes and improvements to bring plan into alignment with goals.

4 

Facilitate the Upgrade of Plan Operations and Governance:

- Refinement of Plan Committee Structure
- Creation and Implementation of Investment Policy Statement
- Acquisition of Fiduciary Insurance

5 

Provide an Independent Vendor Analysis. Services must compliment the goals of the plan and add value to its operations.

6 

Elevate Investments with the goals of:

- Simplifying the Fund Menu
- Augmenting Quality
- Adding Risk-Based Allocation Portfolios
- Scrutinizing TDFs
- Minimizing Fees

8 

Develop Future Opportunities for Improvement with a focus towards:

- Employee Support
- Operational Simplification
- Employee Retirement Readiness

7 

Provide Employee Education about upgrades and improvements to their retirement plan.

- Participant Investment and Enrollment Assistance
- Group Education
- General Questions
- Financial Planning
- Rollovers, QDROs, & Transfers

9 

Review Yearly Accomplishments and Upgrades.

- Vendor Actions
- Plan Demographic and Utilization Review
- Homeostatic Allocation™ Review

