



### *Evaluation*

- Using a variety of evaluation tools, we can evaluate your current plan objectives and concerns, and provide an analysis of other plan solutions.

### *Optimization*

- A feasibility study is completed to identify possible tax benefits of your retirement program for both your company and your employees.

### *Fiduciary Support*

- Meeting your fiduciary responsibilities can be a complex process. We'll work to help you manage risk by developing a formal investment policy statement with clear criteria for selecting and monitoring investment managers.

### *RFP Management*

- We'll work together and be part of your team to walk you through the RFP process, manage the flow of information, analyze and review proposals, and guide you in decision making.

### *Employee Education*

- We'll manage the transition from your current program to your new program, including employee enrollment and education, to help work towards satisfaction through regular financial planning seminars.

### *Program Maintenance*

- We'll monitor your retirement program over its lifetime by advising you on regulatory changes, program enhancements, and investment due diligence on a regular basis.

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