

- Holding quarterly trustee meetings focused on plan health dynamics, fiduciary training, and supporting the role of your HR professional, not just a quarterly investment committee meeting that examines the same “Watch List” every quarter.
- Ongoing and proactive Investment Monitoring – ERISA 3(38)
- Plan Design Optimization Reports™
- Focus on Retirement Readiness and closing the Retirement Gap
- Annual Evaluation of Plan Health
- Education that builds confidence in the program, working to increase deferrals
- Retirement education to optimize investment diversification – ERISA 404(a)(1)(C)
- Customized glide path models built for each participant.
- Financial Wellness – education modules customized for each client group to help employees take control of their personal finances .
- We do not sell products to employees (not life insurance or disability and certainly not individual annuities). Our employee meetings are education and guidance to help them retire better, not a sales opportunity for us to sell additional stuff.
- We help every employee with their retirement planning, regardless of their account balance.