RETIREMENT PLAN SERVICES

Our Model for Client Services

Initial Plan Review

Provide a comprehensive independent assessment of your current plan including:

- Identify Plan Fiduciaries and their Responsibilities
- Investment Policy Statement Review including 404(c) Compliance and Prudent QDIA Selection
- Current Annual Review Process
- Plan Fee Benchmarking
- Documentation of Employee Notices & Communications
- Plan Design & Administrative Procedures

Compare Alternative Retirement Plan Platforms to determine best fit:

- Investment Options
- Expenses

Ongoing Support

Comprehensive Annual Client Review Package:

- Investment Review
- Administration Review
- Fee Review
- Employee Education Review
- Industry and Regulatory Updates

Documented Fiduciary Governance Process:

- Establishment of Retirement Plan Committee
- Fiduciary Training
- Ongoing Investment Monitoring & Reporting
- Annual Investment Policy Statement Review
- Independent Fee Benchmarking
- ERISA 408(b)(2) & 404(a)(5) Review

Employee Education Program:

- Ongoing Review of the Investments, Features, & Costs of the Plan for Participants
- Provide Participants with Sample Investment Allocations based on a Risk Tolerance Questionnaire
- Ongoing Financial Education Customized based on your Needs
- Availability to Answer Questions & Concerns from you and your Employees

Let us help you with your retirement plan while you focus on running your business.

Bleakley FINANCIAL GROUP™