

What are the Benefits of a Fiduciary Review?

To help keep your retirement plan operating properly, a comprehensive fiduciary review should include:



Benchmarking Investment Performance

- » Costs and fees
- » Policy documentation
- » Investment options



Identifying Potential Errors

- » Deferral timeliness
- » Provisional operation
- » Proper coverage



Staying Current on Compliance

- » Statutory requirements
- » Failed test correction
- » Identifying missed deadlines



Identifying Possible Plan Improvements

- » Match evaluation
- » Eliminate eligibility waiting period
- » Roth contribution option

IS IT TIME FOR YOUR PLAN'S FIDUCIARY REVIEW?

Find out more about what to expect from this important checkup. **WE CAN HELP.** Contact us today for a comprehensive fiduciary plan review.