

Writing Your Company's Retirement Plan **Goals**

Five questions to learn if your plan is achieving its mission.

**Employers often don't know
where to start when writing the
company's retirement plan goals.**

Let's change that and blaze a trail to guide your
workforce towards **achieving a confident retirement.**





**What is the goal
of your company's
retirement plan?**





**How well are you
meeting fiduciary
responsibilities?**





**Does your plan
pay reasonable
fees?**





**How does new
legislation affect
your plan?**





**Are there plan design
enhancements that
could help improve
outcomes?**



Don't let your company's retirement plan wander.

Set a clear direction and map out a strategy that is achievable and reasonable.

We'll work with you every step of the way.
Contact us today for a plan review.

This information was developed as a general guide to educate plan sponsors and is not intended as authoritative guidance or tax/legal advice. Each plan has unique requirements and you should consult your attorney or tax advisor for guidance on your specific situation.

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