

Retirement Plan

LIVE CONFIDENTLY KNOWING YOUR BUSINESS' RETIREMENT PLAN OFFERING IS BEST-IN-CLASS

For your business, the benefits of offering an industry-leading retirement plan are immeasurable. Having a plan that is properly designed and scaled to meet your needs will go a long way in solidifying your business and setting your employees on a path toward financial success, not to mention that it is an extremely valuable tool to help attract and retain quality employees.

However, between the plan design, record keeping, investments selection, participant communication and ongoing compliance, designing and maintaining an optimal retirement plan can seem like a daunting task. SignatureFD's Retirement Plan Advisory Team provides a comprehensive review of your current plan to ensure that your retirement offering is:

- Properly designed
- Cost-effective
- Housed with a quality provider
- Independent and free of conflict
- Maximizing plan participation
- Using best base investment options

SERVICES

Fee Benchmarking and Vendor Searches We help you meet fiduciary obligation by performing a comprehensive benchmarking process to ensure competitiveness within the marketplace by analyzing your current plan provider's services, investment opportunities and total plan fees.

Investment Performance Analysis We perform quarterly quantitative and qualitative analysis on each underlying investment option in the plan to ensure that plan participants have access to the best investment options.

Fiduciary Guidance We assist you in measuring the health of your 401(k) plan by providing a Fiduciary Client Reference Guide.

Targeted Employee Education and Communication We engage the plan participants in targeted employee education and communication to help maximize the benefit to your plan participants.

SIGNATUREFD DIFFERENCE

INDEPENDENT & OBJECTIVE

We are independent advisors, allowing us to perfectly match your retirement plan with the provider that has the best total offering based on your specific retirement plan needs.

PROVIDER RELATIONSHIPS

We make it a priority to know the strengths and weaknesses of our providers. This allows us to accurately provide you the best fit at the best price for your specific needs.

COMMUNICATION & EDUCATION

We work in conjunction with our providers to give targeted, personalized employee communication to improve participation, deferral rates and asset allocation.

INVESTMENT EXPERTISE

We have extensive experience managing assets for individuals and institutions and leverage that when analyzing potential underlying retirement plan investments.

FULL SERVICE SUITE

We make our full suite of services (wealth and investment management, insurance and mortgage) available to qualified Retirement Plan Advisory Services clients.

SIGNATUREFD

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Different types of investments involve varying degrees of risk. Therefore, it should not be assumed that future performance of any specific investment or investment strategy (including the investments and/or investment strategies recommended and/or undertaken by SignatureFD) or any investment-related or financial planning consulting services, will be profitable, equal any corresponding indicated historical performance level(s), or prove successful. All services are dependent on the client's specific needs and situation, and it remains the client's responsibility to inform SignatureFD if there are any changes in the client's personal/financial situation or investment objectives. A copy of SignatureFD's current written disclosure statement discussing its advisory services and fees is available upon request.