

Helping your 401(k) Plan Succeed

Everyone wants to improve the bottom line of their 401(k) plan.

The success of your plan lies in a four-step process that will allow the plan to meet the goals and those of the participants.

- 1. Evaluation** - An “*apples to apples*” benchmark comparison.
- 2. Selection** - With over 15,000 funds to pick from, which one is the right one?
- 3. Monitoring** - Quarterly reviews on the plan performance.
- 4. Analysis and Review** - Don't second-guess your decisions.

What Makes Us Unique?

I help people retire successfully.

As a fiduciary advisor I have a duty of loyalty to serve the best interests of the plan participants and to help the plan sponsor do the same.

Your goals are our goals.

My commitment is to improve participant outcomes while reducing the Employer's liability and plan costs.

Service Guarantee!

We will improve the performance of your 401(k) plan by 1% to 2% annually by providing a streamlined ERISA compliant process or we will reduce our advisory fees until we do!

*Don't delay. If your plan has weaknesses, you'll want to correct them immediately.
Call us today @ (440) 498-1396 to learn how your plan can be improved.*