

Our fiduciary services have been an invaluable resource to individuals, plan sponsors and participants alike, improving outcomes at retirement. We are 1 of 4 CEFEX Certified firms in the State of Ohio to provide our retirement plan clients the protection of a 3-part CEFEX Fiduciary Trifecta.

- 1. Meeting ERISA requirements. Fred Reish, a nationally known ERISA attorney has issued a legal opinion stating in part, "...CEFEX Certified firms have met or exceeded the minimum requirements of ERISA."*
- 2. CEFEX Certification of our client's individual plans. AS a Certified advisory firm, our plans pose less risk for plan fiduciaries.*
- 3. CEFEX Certified participant investment advice held to the ERISA Fiduciary Standard.*