

Retirement Made Simple: Two Options, One Decision

Our goal is to take something difficult, planning for retirement, and make it easy!

We know that planning and saving enough for retirement can be a daunting task for investors, so we keep it simple! As your Plan Advisor, we will develop a comprehensive plan to help your employees achieve retirement success!

As we often find with human nature, most employees tend to choose the path of least resistance, making poor choices. We have a proven track record to improve the employees probability of success at retirement.

Your Path to Retirement Success

1

YOU CAN CHOOSE A MODEL

Employees will have a model portfolio to choose from, consisting of the investment funds available in the plan and allocated based on their age and risk tolerance.

As the plan advisor, we will help each employee select an appropriate investment allocation to meet their needs.

2

YOU CAN DO IT YOURSELF

On occasion you will have a few employees that will want to take a more hands on approach in the selection of their investments. No problem! Your employees will also have the option to build their own portfolio. They can determine their own asset allocations using the underlying funds of the plan.