EAGLE
Wealth Management

The Right Advice
Is Everything

RETIREMENT PLAN SERVICES

- Plan review and selection based on quotes from multiple providers
- Transparency of fees and expenses
- Full service transition team
- Ongoing local training and support for plan administrators
- Regulation updates
- Assistance with fiduciary responsibilities and industry best practices
- On site training and educational meetings for employees
- Continual monitoring and updates
- Free personal consultation for employees

WHY SEEK A SECOND OPINION?

WHY NOT?

Knowledge is power. Conduct the proper due dilegence and discover if you have a top-tier retirement plan, or if it's in need of some improvements.

YOUR FREE CONSULTATION

In a world where it seems like nothing is truly for free, this meeting is. Call us at 330-0220 to set up a free consultation and objective evaluation of your current retirement plan, no strings attached. This is your opportunity to be proactive and make sure you have the best plan available and are receiving the support and services you deserve. Topics of discussion at our meeting will include the following:

FEES AND EXPENSES
- Evaluate the management and administrative fees of the plan
- Identify and explain any hidden costs
- Review the transparency and clarity of fees and expenses.

INVESTMENT OPTIONS AND FEATURES
- Analyze investment options and performance
- Review additional plan features, such as auto enrollment, auto increase or qualified default investment options.
- Evaluate roth options versus traditional retirement plan options
- Examine statements for clarity and simplicity
- Review internet functionality for administrators and employees

FIDUCIARY RESPONSIBILITIES
- Education on new legislation, regulations and industry best practices
- Employee participation levels
- Examine the Investment Policy Statement & Education Policy Statement

SERVICE AND SUPPORT
- Assess current services provided
- Review quality of customer service and communication frequency

EMPLOYEE EDUCATION
- Review communication and education programs for both new employees and current employees
- Evaluate the frequency, quality and success of on-site training and informational meetings.

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