

We guide retirement plan sponsors and promote financial wellness for plan participants.

At Plexus Financial Services, LLC we believe retirement saving is an opportunity to cherish, not a challenge to fear.

We are an objective, independent firm specializing in corporate retirement plan advisory services, including 401(k), 403(b), 457, defined-contribution, defined-benefit, and non-qualified plans.

In many cases, we are participating as 3(21) investment co-fiduciaries to our clients' sponsored plans, and we act in the best interests of their retirement plan participants. We work to mitigate the fiduciary risk faced by corporate plan sponsors, and we advocate for employers and their employees. We develop plan objectives, provider partnerships, and open-fund architectures to design and implement best-in-class solutions for our clients' retirement planning needs and objectives.

Above all, Plexus Financial Services works to ensure that employers and employees maximize the

nest-egg-building opportunity provided within corporate retirement plans. We measure plan performance against numerous critical metrics, including aggregate investment lineup performance – and whether plan participants are on target toward reaching their retirement goals.

Corporate retirement planning is all we do. We are not individual wealth managers; we are advisors bound to do right by our clients' sponsored plans and their plan participants. And we want all of our clients' plan participants to be able to enjoy the fruits post-work life.

Together, we will work to get you where you want to be.

Videos

We have informative videos for you to watch on our site.

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Calculators

You can review useful calculators on our site.

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Please feel free to contact us with any questions.

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