



Our Purpose

TO PREPARE EVERY WORKER FOR A BRIGHT FINANCIAL FUTURE – ONE PLAN AT A TIME

We CHALLENGE you to become a 21st century leader in helping employees prepare for a better retirement.

With a few small plan changes and our expert guidance, your employees could be among a new generation of Americans who enjoy fully-funded retirements. You have the ability to help employees prepare for a better retirement.

We'll help you do it.

As a leader, many things keep you up at night. Your retirement plan shouldn't be one of them. Happy employees and a good night's sleep can go together.

Robert Recchia, is a CEFEX-certified investment representative with California Corporate Retirement Services (CCRS). Today*, fewer than 75 investment advisors and/or their investment advisor representatives have been audited and received certification for adhering to global fiduciary standards of excellence. The Pensionmark Retirement Consulting Program has been certified by the Centre for Fiduciary Excellence (CEFEX). As a result of this certification, Pensionmark has allowed selected advisors to be independently certified by CEFEX.

Strict adherence to ERISA's fiduciary standards not only helps manage fiduciary risk but at the same time it can

help participants in their pursuit of improved retirement readiness.

A well-run plan shows employees you value their contribution at work and care about their futures. It gives employers one more important tool to keep good employees .

* August 1, 2014