

Focused Unbiased Experienced



Welcome to Comperio Retirement Consulting

As a plan sponsor, you deserve to work with an independent retirement expert who will act in your best interest to deliver unbiased professional advice, full fee disclosure and no conflicts of interest.

Comperio is an independent retirement plan and investment consulting firm. Our experienced and knowledgeable consultants design and implement fiduciary and investment/fee monitoring processes for plan sponsors on a flat-dollar-fee basis. Plan sponsors choose to work with us for the following three reasons:

- **Focused** You gain an independent expert to provide a menu of style-consistent funds and conduct ongoing due diligence on funds and managers.
- **Unbiased** Your fiduciary responsibility is lessened and processes strengthened, based upon our proprietary, three-stage framework that fully aligns your interests with those of your employees and consultant (Comperio).
- **Experienced** With insights gleaned from Comperio's 20+ years of industry experience, you receive a more accurate view of the fees charged to your plan — and a negotiating edge — due to our in-depth knowledge of fee structures and revenue sharing arrangements with service providers.

Comperio has no financial ties to any product or vendor. We are not a broker. We do not accept soft dollars, we receive no commissions, and we do not sell any products. Therefore, our objectives match your objectives, which enable us to do what is in your best interest, and in the best interest of your employees.

By hiring Comperio Retirement Consulting, you benefit from a firm designed to be your advocate. We acknowledge our fiduciary status in writing, ensuring full fee disclosure and tying the management of your plan to a comprehensive fiduciary process.

We listen to what you need, provide value-added solutions, and proudly serve as your trusted partner.

IN THE NEWS

Comperio Retirement Consulting has recently been named one of the largest 100 Investment Consultants in the United States according to Pensions & Investments (P&I)

OUR SERVICES

We provide value added services to Plan Sponsors and reduce their fiduciary liability.

These services include:

- 401(k) & 403(b) Fiduciary/Investment Consulting
- Fiduciary Education and Training
- Fee Benchmarking Services
- Unbiased Vendor Searches
- Employee Communications Consulting
- Pension Plan Consulting
- Foundation Consulting

ABOUT US



Comperio serves as a fee-only fiduciary for plan sponsors.



As an SEC-Registered Investment Adviser (RIA), we have no conflict of interest with our clients.



Our consulting team has extensive ERISA and investment expertise.



Your employees will benefit from our industry focus and qualifications: AIF® and CEBS.

CONTACT US

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IMPORTANT DISCLOSURES