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ABOUT US (/ABOUT/) RETIREMENT PLAN SERVICES (/RETIREMENT-PLANS/) EMPLOYEE BENEFITS (/EMPLOYEE-BENEFITS/) RESOURCES (/RESOURCES/) NEWS (HTTP://NEWS.STRATEGICBENEFITSERVICES.COM)

Meet Our Advisors

(/about/bios/#james-j-kelley)

(/about/bios/#carol-idone) (/about/bios/#avon-scherff)

(/about/bios/#william-desormeau) (/about/bios/#noah-buck)

How do we differ from other plan advisors?

We're independent to their ownership structure. Many are challenged by the directives of their corporate hierarchy, and others by their compensation arrangements.

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We navigate the complexity of retirement and employee benefits, and keep you from enduring the business of protecting our clients. corporate administrative challenges.

We love what we do. That's why we've been doing this for so long. We're unbiased advisors that accept responsibility for our work. We're experts in regulatory compliance, plan administration, vendor oversight, and education and communication.

Why Choose Us?



<u>(/about/)</u>

Latest News

Strategic Benefit Services expands into the small to mid-sized market (http://news.strategicbenefitservices.com/2019/06/strategic-benefit-services-expands-into.html)

Q1 Market Recap: Equities deliver a convincing head fake (http://news.strategicbenefitservices.com/2019/05/q1-market-recap-equities-deliver.html) read all news >> (http://news.strategicbenefitservices.com/)

FINRA's BrokerCheck (http://brokercheck.finra.org/)

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