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Retirement Plan Advisory & Consulting Services

About Our Company

Fiduciary Experts LLC serves as a consultant and advisor to institutions and government agencies as an independent party and fiduciary of retirement plans.

We work with your TPA, Broker, and Vendor relationships to assure full transparency and help you, the plan sponsor, avoid any conflicts of interest among these servicing parties.

MORE ABOUT OUR COMPANY

Diversity in Education and Communication

To help increase enrollment to your employees – Offered in both English and in Spanish

Investment Consulting and Monitoring

Institutional and individual plans set to a strategic and consistent investment policy statement.

Benchmarking Costs and Services

Independent report your investment committee can use to leverage your current vendor relationships and increase services.

Benchmarking and Costs Renegotiation

Renegotiation of service costs and annual plan review to find ways of improving services and reporting true costs of all parties involved.

Quarterly Reporting

Monitoring and reports provided at the end of each quarter.

Client Vault

Instant view of reports, contracts, and minutes where clients can have access to all documents privately

Would you like more information?

BOOK YOUR CONSULTATION

Mission Statement

Our mission is to lower Plan Sponsor liability through educating and establishing best practices as their investment co-fiduciary consultant. We are passionate about creating value and offering this platform at an affordable cost.

Quick Connect

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