



WELCOME TO SILICON VALLEY RETIREMENT SERVICES!

Founded by industry veterans, our mission is simple: We help clients achieve their goals by providing customized retirement, advisory, and executive benefit solutions with the utmost care.

We accomplish our mission by focusing on our core competencies:

- Customized fiduciary and advisory services that meet the diverse needs of plan sponsors and participants. Silicon Valley Retirement Services offers an institutional-quality investment program designed to provide a robust selection of quality investments for Plan Participants and fiduciary protection for Plan Sponsors.
- Plan administration and consulting services to help ensure the plan is meeting the goals and objectives of the Plan Sponsor. At Silicon Valley Retirement Services, we take the time to learn about the goals of your organization and design a plan that meets your

unique needs. We help to make sure your plan is operating efficiently and is in compliance with IRS and DOL regulations.

- Personalized participant services with a fully integrated investment education program. We believe that a successful participant education program simplifies the retirement planning process and enables plan participants to achieve their retirement goals.

Silicon Valley Retirement Services is your independent retirement plan partner.

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