

ESSENTIALS

Independent Fiduciary Services We offer independent oversight and judgment

Defined Contribution Plans

We complement, not replace, Plan consultants

Defined Benefit Plans we

empower your corporate professional staff

HFG Analyzes, Implements and is Accountable for Fiduciary Decisions

HFG removes the weight of the fiduciary millstone

from around the necks of directors and officers so they can perform with speed and agility in these challenging times. Depending on client need, HFG assumes one of two roles: **Investment Named Fiduciary** or **Independent Fiduciary**. As Investment Named Fiduciary, HFG assumes overall responsibility and liability associated with named fiduciary status. We select and monitor investment options, managers, strategies and consultants for the plan.

As a related service, we also review and negotiate your fees and services with trustees, record keepers and administrators — according to the benefit of best industry practices at reasonable and competitive fees.

As an Independent Fiduciary, HFG provides a tailored selection of fiduciary services. Engagements might include managing a company stock account, approving litigation settlements, or reviewing a plan's participation in a securities lending program.



FIDUCIARY LEADERSHIP

Mitch Shames, a recognized fiduciary expert, has assembled a team of fiduciary professionals of unprecedented talent. With more than 75 years of combined experience, they have handled investment and fiduciary matters for over \$2 trillion in assets under management.

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