Retirement Plan Advisory Services

Stonebridge Financial Group is a registered investment advisory firm with the goal to help clients build and manage highly effective, successful retirement plans.

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Full Service

We are absolutely PASSIONATE about all things retirement plans. It's what we do. Our job does not stop at helping you tailor a unique plan for your organization taking into consideration your goals, that's only the beginning. We'll continually review your plan, focusing on monitoring investments in order to offer your employees top performing choices, mitigating fiduciary risk and preparing participants for retirement. Specialties include:

- Maximize fund performance **- Plan benchmarking**
- Plan compliance and governance **- Employer and employee education**
- Fiduciary status under ERISA 3(21) and 3(38) **- Outcomes and financial wellness**

FIDUCIARY CHECKLIST DOWNLOAD

Maximize Fund Performance

Minimize Fiduciary Liability

Schedule a Call

Simplify Plan Compliance, Admin & Education

Unique Differentiators

Our commitment to delivering innovative ideas and unparalleled knowledge is demonstrated in the certifications, designations and education our advisors have achieved:

- Chartered Retirement Plan Specialist®
- Chartered Financial Consultant®
- Accredited Investment Fiduciary®

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- Certified Behavioral Financial Advisor
- MBA

HAVE A QUESTION? CLICK HERE

Retirement Advisor Council Member

The Retirement Advisor Council advocates for successful qualified plan and participant retirement outcomes.

- We will act with honesty and integrity and in accordance with recognized professional standards and governing laws.
- We will take responsibility and be accountable for our actions and decisions, and will treat all with equality and dignity.
- We will adopt policies and establish processes to secure identifiable client information obtained in the course of providing services and keep it confidential from third parties. We will not seek to derive personal benefit from confidential information.
- We will conduct all activities professionally and seek objectivity in providing all recommendations, so that decisions are only influenced by the best and proper interests of the client.

Schedule a Call

Contact

Stonebridge Financial Group

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Quick Links

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Check the background of your financial professional on FINRA's BrokerCheck.

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