



A Sound Fiduciary Process for Qualified Retirement Plans

QBOX Boxes of Responsibility Process

We Make It SIMPLE

As an independent Registered Investment Advisory (RIA) firm, we have a fiduciary duty to provide advice or options that are in the participant's best interest. Our service model is best visualized through the QBOX "Boxes of Responsibility" which clarifies each Service Provider's:

- Roles and relationships
- Fiduciary status
- Services
- Fees



This illustrates how the service providers combined and interconnected actions achieve the plan sponsor's desired outcome.

Services

We provide for our clients

We do it: ERISA 3(38) Services

We help: ERISA 3(21) Services

Our Partners Include:

- The Independent RIA and RIA Firms
- Institutional Money Managers
- Custodians
- Recordkeepers and Third Party Administration Firms

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