Retirement
Planology

Navigating the retirement plan maze

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Who We Are

When growing organizations need assistance with their employee retirement plan, they come to us. Retirement Planology is a consulting and investment advisory firm that navigates organizations to smart decisions on their employee retirement plan. Plans are complicated and highly regulated at every twist and turn. As your navigator and investment fiduciary, we help map out investment decisions, hiring providers, plan features, engaging employees, and taking work off the plan sponsor's plate. Rely on us to keep the plan in alignment with your organization's goals.

Our Founder

Our Chief Planologist, Courtenay Shipley, has a diverse background in the retirement plan industry providing a unique foundation for her clients in the areas of fiduciary responsibility, investment analysis, and participant education.

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What We Do

Inventive problem-solving is the difference we bring to our clients day in and day out. Why? Because government regulations, financial budgets, talent retention/acquisition, and growth strategy all compete for resources. Without measured review and innovation, your retirement plan can suck up resources without adding value, and leadership can be blindsided. This is where we come in, to navigate the path forward and to optimize the plan for the specific needs of the organization.

STRATEGY

Use your retirement plan to strategically grow your company and attract the best.

SERVICE

Your job is to take care of your people. It's our job to take care of your plan.

SPECIALITY

We navigate the regulations, share fiduciary liability, and advocate on your behalf.

How We Help

We sell advice and expertise, not products. It's time to get answers -- not the run around, and it's time to stop the overwhelm and get back to doing your regular job. You need someone giving advice about the warning signs and how to fix them so you can focus on other things. You know you need to offer the same benefits as competitors, but decisions. We navigate the regulations for you, share fiduciary investment liability, and advocate on your

behalf. Your job is to take care of your people. It's our job to take care of your plan.

WATCH ONE OF OUR FREE WEBINARS→

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We're constantly creating new content to help you learn how to better survey the landscape so that you can position your retirement plan into a strategic asset for your business and be able to use it to grow your company and attract the best into it.

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