Your Retirement Plan Roadmap

Securing the financial future of employees and sustaining the trust of retirement plan sponsors.

How Can We Help You? (/services)

You’ve Got Questions, We’ve Got Answers

Managing your retirement plan is a big responsibility. There are so many considerations to weigh – from plan design to employee education, we can provide you with the insight and solutions for better plan outcomes.

80+ Years

Lawley Retirement Advisors has over 80 years of combined financial services experience. Our team has worked on both sides of the industry – provider and advisor.

120+ Clients

We serve as retirement plan advisor across all plan types- 401(k), 403(b), 457– and industries. Our work also includes consulting solutions and RFP services.

20+ Providers

We are an independent firm – maintaining relationships with multiple providers. Every plan is unique and we strive to provide solutions that best fit the needs of our clients.

Services To Help You (https://www.lawleyretirement.com/services/)

Fiduciary Support (https://www.lawleyretirement.com/services/fiduciary-support/)

Prudent decision making requires a proactive process. Our team will help define committee responsibilities and provide a roadmap for successful execution.

Plan Design Solutions (https://www.lawleyretirement.com/services/plan-design/)

There is no such thing as a “one size fits all” retirement plan. Improve participation and contribution rates through creative and strategic plan design solutions.

Comprehensive Fee Review (https://www.lawleyretirement.com/se fee-review/)

Awareness of plan fees is essential- from investment fees to provider fees, we breakdown costs to provide a complete and transparent analysis.

Investment Selection (https://www.lawleyretirement.com/services/investment-selection-monitoring/)

It is critical to evaluate the appropriateness of your plan investment offerings. Our due diligence process monitors performance, diversification, fees and target-date series, just to name a few.

Compliance & Operations (https://www.lawleyretirement.com/services/compliance-operations/)

Plan sponsors should have a disciplined approach to managing their retirement plan. We provide guidance on complying with ERISA guidelines and a thorough review of the plan document.

Participant Engagement (https://www.lawleyretirement.com/se engagement/)

Employees should be armed with the knowledge to help them make appropriate decisions about their retirement. Our team is dedicated to helping your employees.

There are three key questions relating to retirement plan savings

How much will I need to save?

How should I invest properly?

Will I outlive my savings when I retire?

Insight & Tips

2019 IRS Limits on Retirement Benefits and Compensation

(https://www.lawleyretirement.com/plan-limits/2019-irs-limits-on-retirement-benefits-and-compensation/)

Target Date Funds—Does One Size Really Fit All?

(https://www.lawleyretirement.com/company-news/target-date-funds-does-one-size-really-fit-all/)

HSAs: A Tax Trifecta Investment Opportunity

(https://www.lawleyretirement.com/company-news/hsas-a-tax-trifecta-investment-opportunity/)

More Insight (/about/news)

> *“Understanding the priorities and goals of our clients helps us to provide the best long term solutions.”*
>
> —James J. Rehak Jr., Managing Director

> *“By identifyin*
> *gaps, we can*
> *and imple*
> *strategies to cl*
> *gaps.*
>
> —Todd Tevens, Managi

Financial Wellness Program

Help your employees live life to its fullest, live within their means, and save for their futures by teaching important budgeting tips and saving techniques. Learn more about our new Financial

Securities offered through Cadaret, Grant & Co., Inc. Member FINRA (http://www.finra.org/)/SIPC (http://www.sipc.org/). Advisory services offered through Lawley Retirement Advisors, LLC, an SEC Registered Investment Advisor. Lawley Retirement Advisors, LLC and Cadaret, Grant & Co., Inc. are separate entities.

Lawley Retirement Advisors
Securities licensed in the following states: NY, CA, CO, DE, FL, IL, IN, MI, MN, NC, OH, VA, WA, VT, CT

Phone: 716.849.1584 | **Email**: **lgeorger@lawleyretirement.com (mailto:lgeorger@lawleyretirement.com)**

BrokerCheck **(http://brokercheck.finra.org)**Check the background of this firm on **FINRA's BrokerCheck (http://brokercheck.finra.org)**

Lawley Retirement Advisors© 2019