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Reilly Financial Advisors Comprehensive Retirement Plan Consulting Solution

By integrating Fiduciary responsibilities, Corporate Retirement Plan Investment Consulting, & Employee Education, we are able to offer a full-service retirement plan solution to Plan Sponsors.

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- **[3\(21\) & 3\(38\) Fiduciary](#)**

Under ERISA, anybody who exercises any discretionary authority or discretionary control of a plan is named as a Fiduciary. Set yourself apart by allowing Reilly Financial Advisors to help alleviate portions of your innate responsibility by acting as a Named Fiduciary under ERISA Section 402. Often, we take on the role of 3(21) or 3(38) Fiduciary, depending on the needs of our clients.

- **[Investment Consulting](#)**

Choosing a fund lineup appropriate for your employees with diverse needs can be difficult and time consuming. We help our clients develop a set of guiding principles for fund selection lineup aimed at reducing your fiduciary liability. Our dedicated Investment Committee, comprised of CFAs, CFP®s, and a Ph.D., extend an unbiased view on our suggested fund lineups.

In addition, by providing the option for plan participants to select from a best in class mutual fund lineup along with the ability to invest in Unitized Managed Accounts built with Exchange Traded Funds (ETFs), you can help provide a fund lineup aimed at acting in the best interest of the Plan and it's participants.

- **[Employee Education & Financial Planning](#)**

Satisfied, financially secure people make the best employees. Our employee education program and advisory services

We use technical and analytics 'cookies' to ensure that we give you the best and most relevant website experience.

Why Reilly Financial Advisors?

No two companies are the same, and thus it's increasingly important to work with a consultant that has the ability to provide customized solutions to meet each unique circumstance. Through transparency, education, and empowerment, we help our clients navigate a path to successful retirement.

- ✓ 3(38) Fiduciary
- ✓ Fund selection and analysis
- ✓ Advisor-managed portfolios
- ✓ All fees completely disclosed
- ✓ Team approach to plan management with dedicated experts in each department

Plan Sponsor Support

We understand the commitment associated with administering and maintaining 401(k) plans. That's why Reilly Financial Advisors helps you each step of the way. You can expect high-quality services, including:

- Plan design support
- Provider Benchmarking/Plan Health
- Investment Due Diligence
- Online and phone access to all plan information and statistics
- Plan Design Consulting
- Dedicated point of contact to help answer any questions
- Streamlined web site with an array of tools
- Education
- Plan Policy Statements (Investment Policy, Fee Policy, Education Policy, Board Resolutions, Committee Charters)

Participant Support

Participating and investing in an employee-sponsored retirement plan can be confusing to your employees. Count on Reilly Financial Advisors to help employees navigate through the process from beginning to end, including but not limited to:

- On-site enrollment
- Individual meetings with investment professionals
- Group investment education meetings
- Bi-lingual representation if needed

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