

# OPTIMIZE YOUR ORGANIZATION'S RETIREMENT PLAN

START BUILDING A BETTER FUTURE TODAY

RFM has more than 51 years of combined success in advising organizations. **We'll help you choose the right retirement plan for your employees.**

RFM has more than 51 years of combined success in advising organizations. **We'll help you choose the right retirement plan for your employees.**

***PROVIDING A  
DIRECT PATH TO  
RETIREMENT  
PLAN SUCCESS  
FOR  
ORGANIZATIONS  
IN THE  
SOUTHEAST***

[Learn About Our Retirement Plan Solutions](#)

WHY RETIREMENT FUND  
MANAGEMENT (RFM)?

Retirement Fund Management (RFM) is an Atlanta, GA-based Registered Investment Advisor with the SEC. We offer retirement plan advisory services to organizations throughout the Southeast, serving employees and employers on a fee-only basis. The companies we serve prioritize employee financial health representing a broad range of industries and sizes.

The plans we service include 401(k), Defined Benefit Pensions, 403(b) and other Qualified and Non-Qualified Retirement plans. We deliver expertise guided by the goal of readying employees for enjoyable retirement years. Our commitment is to be objective, unbiased and free from any agenda to offer other investment or insurance products.

## OUR SERVICES

RFM offers the following core services to its clients. Each service is an important component of a healthy retirement plan offering and should be customized to meet your company's unique needs.

### FINANCIAL WELLNESS

Assessment and goal setting matched with employee interaction

### RETIREMENT PLAN HEALTH

Annual plan health assessments include valuable insight for employers

### INVESTMENT SELECTION

Proprietary investment research aids in selecting a solid mix of investments

### FIDUCIARY BEST PRACTICES

Always serving as either a 3(21) or 3(38) Fiduciary

## OUR PROCESS TO PURSUING RETIREMENT PLAN SUCCESS

Once we understand your goals, we then set out to design a retirement plan benefit your employees will truly value.

# IS YOUR RETIREMENT PLAN OPTIMIZED?

Contact Retirement Fund Management today to find out how we can help  
you maximize your retirement plan.

Contact RFM Today

OUR LOGO REPRESENTS  
HOW WE SERVE YOU.



The journey begins when the employee elects to plant the seed by contributing to a retirement plan. We provide financial wellness education and encourage employees to actively participate in their retirement benefit.

## CONTACT THE RFM TEAM



**Mark McCoy, MBA, AIFA®**

**Founder and President**



**Ross Sims, AIF®, CHSA®**

**Partner**

Name

Organization

Email Address

Phone

Message

//

Send

## ABOUT RETIREMENT FUND MANAGEMENT (RFM)

Retirement Fund Management (RFM) is an Atlanta, GA-based Registered Investment Advisor with the SEC. We exclusively offer retirement plans to organizations throughout the Southeast, serving employees and employers on a fee-only basis.

The plans we offer include 401(k), Defined Benefit Pensions, 403(b) and other Qualified and Non-Qualified Retirement plans. We deliver specialized expertise and remain steadfast in readying employees retirement.

© 2018. Retirement Fund Management (RFM). All rights reserved.

*Website by Traverser Marketing*

## CONNECT WITH RFM

📍 Five Concourse Parkway, Suite 3000, Atlanta, GA 30328

📞 770.399.8803

✉ info@rfm401k.com

🌐 Join our LinkedIn network

# FIND US ON BROKER CHECK

✓ BrokerCheck

[Home](#)   [RFM Story](#)   [Problems We Solve](#)   [Services](#)   [Resources](#)   [Contact](#)  
[Privacy Policy](#)   [Legal Disclaimer](#)   [Disclosures](#)