



**RETIREMENT PLAN CONSULTING**

LET'S TALK!

**PEOPLE FOCUSED**

The financial wellbeing of your employees is our main objective.

## **AGILE PROCESSES**

Gain access to the buying power of large groups and the flexibility of a boutique.

## **TRANSPARENT**

We are committed to your plan's performance. Project management moves goals forward with clear document

# **STRAIGHT-FORWARD RETIREMENT PLAN CONSULTING SERVICES**



A PARTNER WORKING FOR YOU

# RESOURCES

ARE YOU READY FOR AN AUDIT?

**GET OUR DOL CHECKLIST**

**EBSA 2015**

**ARE YOU COMPLIANT?**

**GET THE EMPLOYEE COMMUNICATIONS GUIDE**

**EBSA 2016**

**IS YOUR PLAN ADVISOR A FIT FOR YOU?**

**GUIDE ON CHOOSING A PLAN PROVIDER**

**Fidelity 2016**

# LET'S TALK!

Name \*

First

Last

Email \*

Phone

Topic or Question \*

How can we help you?

**SEND**

02:50

# OUR TEAM

**GREG FIORE**

MANAGING PARTNER

MEET GREG

A CLIENT HAS THE SAME VALUES AND CULTURE, AND THEY VIEW THE WORLD THE WAY WE VIEW IT, THEN WE WANT TO PARTNER WITH THEM

**JENNIFER PEARSON**

VICE PRESIDENT

MEET JEN

EVER TIME, YOU JUST NATURALLY FIND A BETTER PROCESS, TWEAKING IT HERE AND THERE.”

“OUR CLIENTS CAN FOCUS ON RUNNING THEIR BUSINESS WHILE



**GLENN SHAW**

INVESTMENT CONSULTANT

MEET GLENN

**"WE TREAT EVERY**

**EDWARD WOJTON**

LEAD CONSULTANT

MEET ED

**TOBY REGAL**

LEAD CONSULTANT

MEET TOBY

**"WE CONTINUE TO REINVEST AND LOOK FOR CREATIVE WAYS TO HELP BOTH EMPLOYERS AND EMPLOYEES."**

**KATIE GREEN**

LEAD CONSULTANT

MEET KATIE

**"WE HELP OUR CLIENTS TODAY, SO THEIR EMPLOYEES ARE READY FOR TOMORROW."**

**"OUR CLIENTS WANT THEIR EMPLOYEES TO BE**

**CHRIS THURMAN**

ACCOUNT MANAGER

MEET CHRIS

**"THE MOST REWARDING T**

**EMILY JENNINGS**

ACCOUNT MANAGER

MEET EMILY

**"WE'RE CONSTANTLY LOOKING FOR WAYS TO IMPROVE, BECAUSE**

**ABOU GBANE**

REPORTING ANALYST

MEET ABOU

**"EACH O**

**LORENZO LEON**

REPORTING ANALYST & OFFICE MANAGER

MEET LORENZO

**"WE FOCUS ON WHAT'S MOST IMPORTA**

**HENRY YOUNG**

INVESTMENT ANALYST

MEET HENRY

**KATE BARTON**

MARKETING MANAGER

MEET KATE

COMMUNICATION IS ESSENTIAL FOR MAINTAINING STRONG RELATIONSHIPS WITH OUR CLIENTS."

**NAN HONG**

OPERATIONS MANAGER

MEET NAN

ARE A PERFECT FIT FOR OUR CLIENTS."

**BROOKE SAUNDERS**

ACCOUNTING

MEET BROOKE

OUR GOAL IS TO MAKE RETIREMENT PLANNING SIMPLE AND MEANINGFUL FOR OUR CLIENTS."

