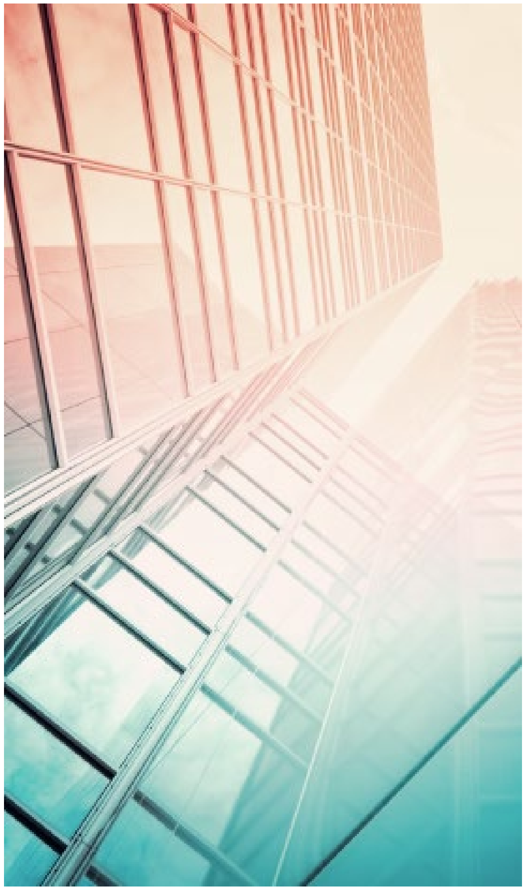
The Department of Labor

Recommends that you benchmark your retirement plan on a regular basis. This can be a time consuming, confusing process. We encourage you to let us help you consolidate and conform all pricing bids to a similar format to educate you on what is available and ensure you are completing your fiduciary responsibility.

We have refined the process and would enjoy an opportunity to start building a relationship with your organization.

RETIREMENT READY ADVISERS

Retirement Ready Advisers has always prioritized relationships with our clients to help ensure their financial goals are accomplished.



When was the last time you benchmarked your 401(k), 403(b), or 457 plan?

The Department of Labor asks a lot of plan sponsors:

Among other responsibilities, plan sponsors are fiduciaries regarding the components below

Evaluating Service Providers

- Recordkeepers
- Third Party Administrator
- Advisor

Fund Monitoring

- Performance
- Fees
- Opportunity for Diversification
- Compliance with Investment Policy Statement

General Operation

- Investment Policy Statement
- Investment Committee
- Enrollment Meetings
- Education

We are excited to help!

At Retirement Ready Advisers, we know that you are experts regarding your business, we are experts in the defined contribution space.

Years of experience in this space has led to refining a process to assist plan sponsors, a brief outline starts with:

1) Initial Consultation – we will discuss the plan, where it is, goals you have as a plan sponsor for your participants. If you want to move forward with a complimentary benchmarking we would also collect documents

2) Benchmark the plan – zero commitment in cost or time from the plan sponsor. We take data from the consultation, solicit bids, and build out a report

3) Second Consultation – with a completed benchmark, we will educate you on where your plan stands in comparison to the marketplace.

RPAG

We believe that plan benchmarking should be done independently. That is why we use software that allows us to put together blind pricing bids to ensure you are getting the best possible bids from retirement plan providers for your company.

Fi360

Fi360 is a well-known independent fiduciary fund monitoring service. We utilize this software to ensure funds are appropriate and can help your plan participants accomplish their goals in retirement.

Our Role

Is to provide the plan sponsor with a systematic process to allow you to make a time-efficient and well-informed retirement plan provider decision. Ultimately, our report documents whether current fees, services, and investment opportunities are competitive in the marketplace, while helping plan fiduciaries meet their responsibilities as set forth by ERISA and the Department of Labor. The objective is to identify retirement plan providers who deliver the highest quality products and services at the most competitive total plan costs. By asking pertinent questions, we will uncover the core competencies and weaknesses of each prospective provider. The results will arm fiduciaries and plan sponsors with a definable process and provide meaningful fee, service, and investment benchmarks used to evaluate if changes are warranted.

Contact Us

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