VESTED WEALTH ADVISORS
Trusted Advice. Secure Solutions.

Retirement Plan Services – Our Process

Steps to building a stronger retirement plan for your company.

1. Evaluate your Current Plan – Our easy-to-use tool provides you with an evaluation of your company's retirement plan objectives and concerns and an analysis of other plan solutions. We'll also discuss and review funding strategies for fee administration.

2. Optimize Your Plan – We conduct a feasibility study to help maximize the tax benefits of your retirement program for both your company and your employees.

3. Get Protection as a Fiduciary – Meeting your fiduciary responsibilities can be a complex process. We help control risk by developing a formal investment policy statement and establishing clear criteria for selecting and monitoring investment managers. Vested Wealth can also act as an ERISA Section 3 (38) fiduciary thereby providing significant reduction in your fiduciary responsibilities and liabilities.

4. Select 'Best-in-Class' Vendors – We're on your team. We'll sit on your side of the negotiating table to walk you through the RFP process, manage the flow of information, analyze and review proposals and guide you in making an informed and knowledgeable decision about investment funds, record-keepers, custodians and TPAs.

5. Install Participant Education Programs – We mange every step of the transition from your current retirement program to your new program. We enroll your employees and educate them on the benefits of their new program. We'll ensure their satisfaction through quarterly, semi-annual and/or annual education and financial planning seminars.

6. Monitoring and Maintenance– We'll manage the health and welfare of your retirement program over its lifetime, advising you on regulatory changes, program enhancements and investment due diligence on a quarterly or semi-annual basis.