



401(k) Statement of Service

Our Service Philosophy

Our service consists of assisting you in assessing, analyzing, and addressing the specific needs of your plan to maximize its value to your organization. Through careful consultation we find the right provider and right investments for you and your employees.

WHAT We Do

- Improve employee satisfaction, retention, and recruitment
- Improve operational and cost efficiencies
- Manage fiduciary risk
- Streamline investment selection and management

Initial Services

- No-Cost, No-Obligation consultation
- Design plan and customize to your specifications
- Compare plan providers
- Present plan and disclose all fees
- Direct implementation or conversion of the plan
- Educate and assist in enrollment of employees

Ongoing Services

- Annual plan review
- Quarterly investment performance review
- Investment selection changes as needed after review
- Annual in person employee educational meeting
- Available to employees for education and assistance on retirement planning

Our goal is to assist you in providing the most efficient, robust benefits possible to you and your employees. Through careful planning and a commitment to ongoing service we know that we can help.

Contact Transition Planning to receive your no-cost, no-obligation consultation today.

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