StatonWalsh

Corporate Retirement Plan Consulting

Client Profile:

Businesses looking to deliver a retirement plan experience that drives value for the company through cost control, operational efficiency and fiduciary education.

Services We Offer:

Plan Level:

- Fiduciary Responsibility Guidance
- Annual Retirement Plan Analysis, Design & Funding Audit
- Fund Level Due Diligence and Monitoring
- Negotiated Plan Pricing (Benchmarking)
- Online Plan Management

Participant Level:

- Access to a Financial Advisor
- Continuous Financial Education Curriculum
- Online Individual Account Management
- Timely Communication on Current Financial Topics
- Risk Tolerance Evaluation and Portfolio Alignment
- Access to Personal Financial Planning App

Cost Structure:

BILLING STRUCTURE

Asset Based or Flat Fee

*Minimum first year revenue is $5,000. If the plan does not meet that threshold, at our discretion,a quarterly fee can be charged to make up the difference.

Asset Based Pricing:

$0-$5,000,000*	0.50%
$5,000,000 +	Flat Fee Negotiable

GET STARTED TODAY

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