



PWA FINANCIAL

PARTICIPANT FOCUSED | RETIREMENT READY

WHO WE ARE

PWA Financial

Independent Fiduciary Advisors

Retirement Plan Specialists

Credentialed Staff

- CERTIFIED FINANCIAL PLANNER™
- Accredited Investment Fiduciary®

Dedicated to Excellence

WHAT WE DO

Independent Advice and Guidance

We are an independent firm, which means our advice and guidance are free from potential conflicts of interest. Our sole focus is providing recommendations that are in the best interest of our clients.

Our Process

Our firm has developed a comprehensive process for a fiduciary standard of care focused on organizing, formalizing, implementing, and monitoring all aspects of your retirement plan. We specialize in optimizing plan administration and participant education in order to free up time for you, the plan sponsor, to do what you do best; run your business.

Our Philosophy

Our firm believes retirement plan success is accomplished through independent analysis, prudent due diligence, and targeted plan and participant outcomes. We take a personal approach by getting to know the plan sponsor, the industry they work in, and what challenges they are facing, in order to target our services to meet each client's individual needs.

THE PWA FINANCIAL TEAM



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OUR SERVICES



Fiduciary Services

- Document Review
- Plan Fee Monitoring
- Fiduciary Vault



Investment Monitoring

- Investment Policy Statement
- Committee Administration
- Performance Monitoring



Financial Wellness & Education

- Participant Education
- Wellness Workshops
- Retirement Readiness Analysis