



HARRIS GROUP
WEALTH MANAGEMENT

Retirement Plan Services FROM A TRUSTED PARTNER

Helping your employees save for their retirement through a 401(k) or similar plan is one way you can make a real difference in their lives. But these plans may also be confusing and cumbersome—challenging for you and for them.

That's why you need a partner, an ally, to help bring you and your employees services to simplify and facilitate the process.

That's why we're here. Our ultimate goal is the same as yours: the retirement readiness of your employees.

We are retirement plan financial professionals, and so much more.

- **Plan goals and objectives** — we can help establish clear goals for the plan as well as strategies for reaching these objectives.
- **Plan vendors and fees** — when you are considering different vendors, we can help you evaluate their services and the reasonableness of their fees.
- **Employee education** — when employees are engaged in the learning process, they are more likely to make good investment decisions. We can help educate them in a way that encourages action.
- **Plan and service support** — a plan requires specialized services from multiple providers. We can assist with the coordination of these services, helping the plan run smoothly.
- **Plan design consulting** — we can consult with you about plan design elements that may help increase participation and savings, thereby helping employees become successful retirees.





How can we help?

Retirement plans are complex; working with a financial professional can help you make the most of yours. We can assist you with:

Education

Employees need to understand financial concepts, yet many feel overwhelmed when the topic is presented. They tune out, rather than apply what they learn.

Design

History shows that relying on employees to make the best financial decisions for themselves does not work reliably. Plans need to incorporate design features that recognize human behavioral foibles and overcome them.

Mechanics

Retirement plans have many players and lots of moving parts. There are record keepers, thirdparty administrators, and other service providers involved in the implementation and administration of a 401(k) plan. Coordinating and monitoring them requires systems and expertise.

Fiduciary Support

As a plan sponsor and fiduciary, you have legal responsibilities to ensure the plan operates exclusively in the best interests of its participants and beneficiaries. We can assist you in managing your fiduciary responsibilities.

» When you partner with a qualified financial professional whose goals for your plan align with your own, you can feel confident that your plan is the best it can be. Talk to us today about how we can help bring that confidence to you.

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