Retirement Plan Solutions

ADVICE | WEALTH MANAGEMENT | RETIREMENT PLANS

T.Sapp Financial Partners is unique in the retirement plan world. We specialize in customized qualified plan solutions for small businesses while helping plan sponsors manage their fiduciary obligations. We do things differently because we want your plan to be successful for the owners and for all participants. Using our robust Retirement Plan Blueprint review process and ongoing service model, we are committed to helping employers meet and manage their fiduciary duties while providing a retirement solution that works for plan participants and business owners, alike.

20 YEARS

Maximizing plan sponsor savings goals and objectives

Tailored advice and service

Helping plan sponsors determine their fiduciary obligations

CFP

Over two decades of experience; Led by a CERTIFIED FINANCIAL PLANNER™

Tracee J. Sapp, CFP ®, Founder

Our Difference

- Plan Fee Benchmark of your plan to understand who and what you are paying
- Hands-on education and tools for employees to make informed decisions for their future
- Investment selection policies and processes to help you manage risk
- 3(21) or a 3(38) fiduciary coverage from your plan provider
- Investment analysis independent from your plan provider

The Retirement Plan Blueprint

The Retirement Plan Blueprint is our multi–step process to evaluate, manage and service your retirement plan. Through our robust review process and ongoing service model, we ask key questions to understand your original plan goals and objectives for you to be in the best position to pursue them.

Initial Plan Review

Plan Design

Investment Review and Process Plan Fee Benchmark

Retirement Readiness

Fiduciary Review

Ongoing Services

Quarterly Investment Review

Retirement Readiness

Consulting for retirees and terminated participants

Annual State of the Plan Review

You've Got This.AndWe've Got You. Contact us today to design your Retirement Plan Blueprint.

470 E. Paces Ferry Road
Suite 200 Atlanta GA 30305
404-978-2277 tsapp@tsappfp.com www.tsappfp.com

T.SAPP financial partners a financial planning firm