

What Matters in a Retirement Plan



Saving for retirement is one of the most important things individuals can do, so having a plan that can help your employees reach their goals is one of the most important benefits you can offer. Are you giving your employees their best chance for a successful retirement?

Four Foundations

When it comes to a retirement plan, providing sound financial investments is crucial, but we offer more than that. We go above and beyond to deliver these four foundational features to you and your employees:

Fiduciary Protection

As fiduciaries, we act in the best interests of your employees. Our partner, BAM Retirement Solutions, takes on the fiduciary liability of selecting and monitoring the plan's investment lineup, relieving your company of that duty. They provide professionally managed, risk-based portfolio options that help make it easier for participants to make investment decisions.

Prudent Investment Strategy

When it comes to investing, we value evidence over emotion. We don't chase after the next big stock pick — we use more than 60 years of academic research to guide our investing strategy. And we can provide objective guidance and education to your employees to help them focus on long-term goals, not short-term hype.

Proactive Participant and Plan Sponsor Support

We offer the type of support participants need, helping them understand saving, investing and the importance of risk. They'll get the tools they need to help them make smart decisions about their retirement future. As the plan sponsor, you can count on our support to ensure your plan is operating optimally and you fulfill your duties as plan fiduciaries.

Transparency

Our fees are easy to understand and fully disclosed upfront, so you'll know exactly what you're paying with every aspect of your plan. We use a scalable fee structure so that as your plan grows, your fee as a percentage of assets goes down.

Let's Work Together

Creating a comprehensive retirement plan that works for you and truly benefits your employees can seem like a big task. But we make it easy. It's what we do.

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