

#### PLAN BENCHMARKING

- Participant utilization and overall plan health assessments
- Fees and expenses cost comparison
- Plan design & features competitive analysis

#### PARTICIPANT EDUCATION

- Onsite seminars
- Customized enrollment meetings
- One-on-one employee meetings
- Participant newsletters

#### FIDUCIARY MANAGEMENT EDUCATION

- Investment Policy Statement review
- Education Policy Statement review
- Fiduciary briefcase for plan record retention
- Assist with document due diligence process



#### SERVICE PROVIDER REVIEW & CONSULTATION

- Proposal evaluations
- Negotiate competitive cost structure
- Problem resolution liaison
- Coordinate effective service strategy

#### PLAN DESIGN ANALYSIS

- Alignment with business goals
- Optimization review
- Employee demographic analysis
- Coordination with other employee benefit plans

#### INVESTMENT REVIEW & PERFORMANCE REPORTING

- Performance reports
- Diversification review
- Benchmark investment expenses
- Investment search and recommendation
- Ongoing review meetings