

## Meet our Account Executive Team!



## Your Dedicated Relationship Team

Are you meeting your fiduciary responsibilities? Need more time in your day to focus on the tasks and job duties of your role outside of management of the 401(k) plan?

Our Account Executive Team assists the financial professionals providing the service you can lean on for your 401(k) investment due diligence, plan design consulting, fee benchmarking, compliance assistance, employee education services, fiduciary fitness program delivery & documentation, as well as regular legislative & regulatory updates.

We take tremendous pride in striving to provide our Plan Sponsor clients with retirement plan cost savings & healthy financial wellness outputs for all their employees.

We absolutely love what we do!

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