

# WHEN CHARLIE GETS INTO HIS 401(K) COACH EDUTAINMENT, JOHN MAYBURY AND HIS STAFF GRAB SEATS IN THE MEZZANINE



*Charlie Epstein, William Brown, Estrella Kuilan, Lorrie O'Connor, John Maybury and Richard Raiche*

**J**ohn Maybury and Charlie Epstein have an awful lot in common. To begin with, they're both innovators. Charlie, with his 401k Coach<sup>®</sup> Retirement Plan Solution<sup>™</sup>, has created a national model for encouraging active participation in 401(k) retirement plans. John, as the founder and president of Maybury Material Handling, has changed the way manufacturing, distribution and retail companies throughout the northeast approach the storage and retrieval of parts, supplies and goods. John and Charlie also share the belief that their clients are best served when they're able to forge close relationships. John and Charlie work hard to understand clients' goals as well as the challenges clients face, which allows them to help create individualized solutions that support growth and position clients to succeed. Charlie devises the most effective way to engage each client's staff in order to increase understanding of and participation in 401(k) plans. John provides a one-stop source for materials handling equipment and supplies and offers customized solutions for maximizing efficiency at both new and existing facilities. Probably most important, however, John and Charlie share the goal of giving the staff at Maybury Material Handling the chance to make the most of their 401(k) plan, making John's business stronger by keeping morale and staff retention high.

Charlie helped John set up Maybury's 401(k) plan three years ago. Since then, he's been back on a regular basis to provide education for John's staff of 80-plus employees. Charlie's Edutainment approach not only energizes John's staff but provides them with information they can use to make better choices regarding their 401(k) investments. That, in turn, helps John retain the people who make his clients' businesses run better –

whether it's by designing custom storage structures and mezzanines, connecting them with the right equipment (forklifts, scissor lifts, supply carousels ... ), or providing state-of-the-art equipment monitoring and maintenance services.

Charlie can help improve staff retention and morale at your business, too. A member of the original class of Certified Family Business Specialists from the American College, Charlie has been providing guidance to owners of closely held businesses for more than 27 years. With Desirement Planning<sup>™</sup>, he can help you attract and hold on to people who will help your business continue to succeed and grow. With Charlie sharing your goals and putting his organization and expertise to work for you, you'll have the equipment you need to elevate your business to new heights.

## EPSTEIN FINANCIAL GROUP



Charlie Epstein, CLU, ChFC, AIF<sup>®</sup>, Certified Family Business Specialist  
Talk to us about The Family CFO<sup>®</sup> process.

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