

The 401k Coach® Retirement Plan Solution™

Six steps to building a stronger retirement plan for your company.

Benefits

- Greater employee satisfaction and participation
- Delegated fiduciary plan requirements
- Reduced plan anxiety
- State-of-the-art processes

- Out-sourced HR functionality
- Educational and financial planning services provided by an independent registered investment advisor.

Stage 3 The Fiduciary



Meeting your fiduciary responsibilities can be a a formal investment policy statement and for selecting and monitoring

Stage 4 The RFP Manager™



knowledgeable decision.

retirement program to your new program. We enroll your We're on your team. employees and educate them We'll sit on your side of the on the benefits of their new negotiating table to walk program. We'll ensure their you through the satisfaction through quarterly, RFP process, manage semi-annual and annual the flow of information. analyze and review proposal and guide you in making an informed and

Stage 6 The Wealthcare **Monitor**™



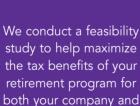
We'll manage the health and welfare of your retirement program over its lifetime, advising you on regulatory changes, program enhancements and investment due diligence on a quarterly or semi-annual basis.

Stage 1 The Plan **Evaluator**™



Our easy-to-use tool provides you with an evaluation of your company's retirement plan objectives and concerns and an analysis of other plan solutions. We'll also discuss and review funding strategies for fee administration.

Stage 2 The Plan **O**ptimizer[™]



your employees.

complex process. We help control risk by developing establishing clear criteria investment managers.



Stage 5

The Paychecks for

Life[®] Experience

We manage every step of the

transition from your current