



# The Compass 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 1

#### The Retirement 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 Retirement Plan Optimizer™

We conduct a feasibility study to help maximize the tax benefits of your retirement program for both your company and your employees.

### Stage 3

#### The Fiduciary Shield™

Meeting your fiduciary responsibilities can be a complex process. We help control risk by developing a formal investment policy statement and establishing clear criteria for selecting and monitoring investment managers.

### Stage 4

#### The RFP Manager™

We're on your team. We'll sit on your side of the negotiating table to walk you through the RFP process, manage the flow of information, analyze and review proposal and guide you in making an informed and knowledgeable decision.

### Stage 5

#### The Edu-tainment Experience™

We manage every step of the transition from your current retirement program to your new program. We enroll your employees and educate them on the benefits of their new program. We'll ensure their satisfaction through quarterly, semi-annual and annual education and financial planning seminars.

### 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.