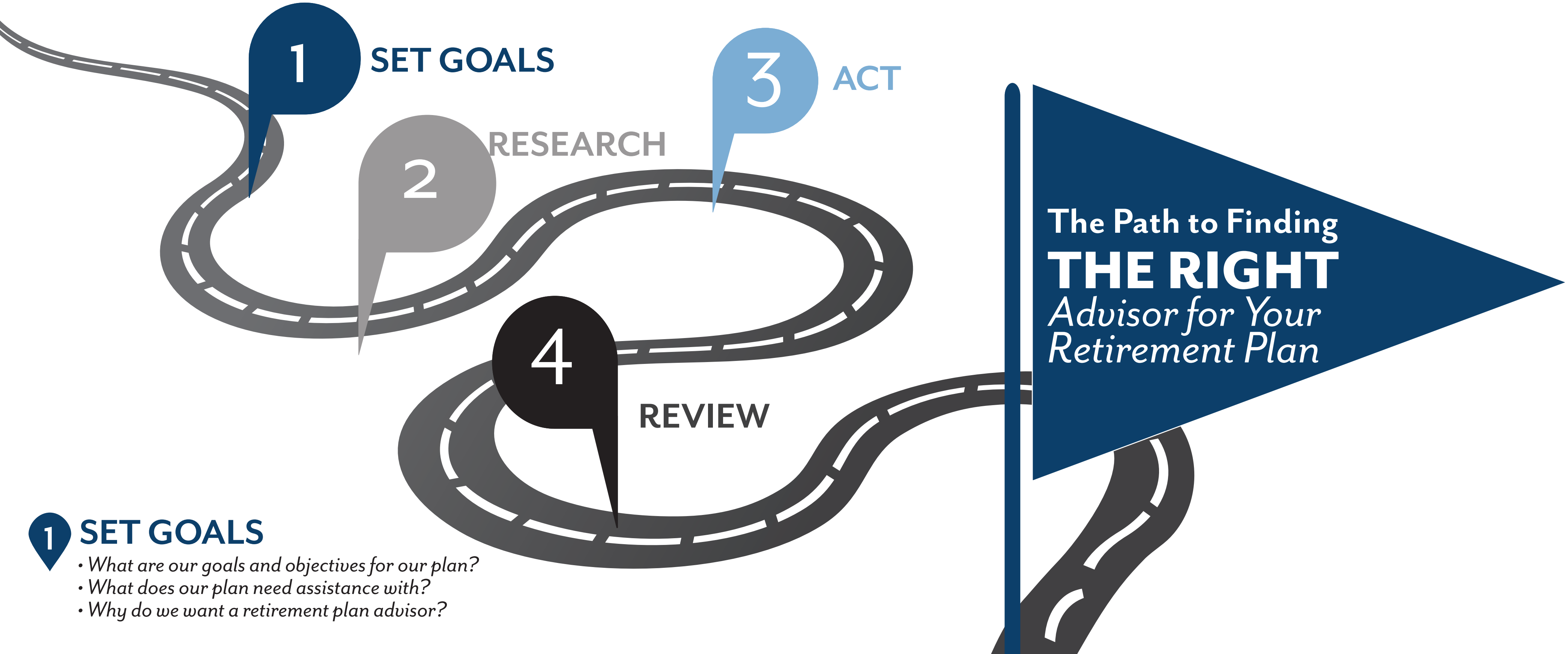

1 SET GOALS

- *What are our goals and objectives for our plan?*
- *What does our plan need assistance with?*
- *Why do we want a retirement plan advisor?*

2 RESEARCH*

- *Is our advisor commission or fee-based?*
- *Does our advisor act as a fiduciary?*
- *What is the focus at our advisor's practice?*
- *Is the advisor properly licensed and insured?*

3 ACT

- *Does our advisor conduct annual or semi-annual plan reviews?*
- *Does our advisor promote and encourage participation in the plan?*
- *Does our advisor coordinate group or 1-on-1 employee education meetings?*

4 REVIEW

- *Does our plan committee have a process to review all of our source plans?*
- *How much are we paying for this plan?*
- *Does our advisor hold the service provider accountable?*
- *Has our advisor created an investment policy statement and a process to review our plan's investment?*

There's no better time than now to talk to Lawley Retirement Advisors.

855.841.1135 | lawleyretirement.com

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Visit www.finra.org & www.advisorinfo.sec.gov

for more specific details regarding retirement plan advisor selection

** SEC & FINRA offer websites that allow plan sponsors to look up specific information about a financial advisor or firm*