Lawley
RETIREMENT ADVISORS

How Can We Help You?

Redefine Retirement Plan Success

Lawley Retirement Advisors helps you navigate the complexities of retirement plans. We provide solutions and support where you need it most.

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

lawleyretirement.com | 855.841.1135 | info@lawleyretirement.com

Services To Help Simplify & Improve Your Retirement Plan

Fiduciary Support | *Understanding and mitigating your risks*

- Act as a 3(21) and/or 3(38) investment advisor
- Comprehensive plan reviews and assistance with committee functions, including by-laws, charters and board resolutions
- Timely legislative and compliance updates
- Provide fiduciary education for plan sponsor and committee members

Plan Design | *Evaluating your plan*

- Evaluation of your current plan and options
- Structure plan features to improve participation and retirement outcomes
- Guidance on enrollment, eligibility & distribution options
- Strategies to optimize employer contributions

Comprehensive Fee Review | *Full fee disclosure*

- Evaluate provider fees and services
- Independent plan benchmarking services
- Request for Proposal (RFP) services
- Fee transparency & expense handling

Investment Selection and Monitoring | *Benchmarking results*

- Education on available investment options for plan sponsors
- Selection of Target Date fund and qualified default investment alternative (QDIA) solution process to most plan demographics
- Comprehensive Investment Scoring and Due Diligence process
- Communicating in-depth knowledge of current market trends

Plan Compliance & Operations | *Keeping you up-to-date with the latest legislation*

- Prepare and review Investment Policy Statement
- Plan audit and year end compliance testing support
- Assistance with fee disclosure requirements

Participant Engagement | *Optimizing your employees' utilization of your retirement plan*

- Facilitate employee education and enrollment meetings
- One-on-one participant sessions
- Help with creating employee communication
- Financial Wellness programs designed around retirement readiness and financial literacy
- Monitor plan trends- participation rates, contribution levels and demographics

LAWLEY RETIREMENT ADVISORS | *Retirement Plan Counsel*
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