

## RETIREMENT READINESS IS OUR MISSION

*We can help simplify the complexities of retirement planning. Build a stronger retirement plan and empower your company's productivity and profitability*



2019 Financial Times Top 401k Advisor<sup>1</sup>



*Affiliate of CRI TPA Services,  
providing client centered plan design,  
administration, and compliance services*

### Plan Design Consulting

*In conjunction with CRI TPA Services, we also offer Employee Matching Programs, Profit Sharing,/Discretionary Contribution Analysis, Cash balance/defined benefit plans, and can address Eligibility/Enrollment issues.*

#### FLEXIBLE FEE STRUCTURE

- Independent and objective
- Evaluate performance, expenses and strategies
- Easy to understand 10-point scoring system

#### FIDUCIARY COMPLIANCE

- Ability to serve as 3(38) or 3(21) fiduciary
- Fiduciary education for plan trustees
- Plan service calendar and documented reviews
- Investment Policy Statement review

#### PLAN FEE BENCHMARKING

- Analyze current plan fees
- Negotiate fees with current provider
- Compare competitive proposals

#### PARTICIPANT SERVICES

- Enrollment assistance and support
- Plan education
- Individualized advice

LevelFourGroup.com | 866.834.1040

<sup>1</sup>Selected based solely on quantitative factors, including plan assets and number of plans, as reported directly by nominees

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