



401(k) Fiduciary Plan Services

We can help protect **you** in this ever-changing regulatory environment

Are you prepared for the 2017 DOL Fiduciary Rule?

In this era of increased regulation and rampant litigation, IAG's 401(k) Fiduciary Retirement Plan Services is designed to provide the expertise and experience you need to comply with the newly passed Department of Labor Fiduciary Legislation.

If not, we can help!

Our goal is clear- To become YOUR trusted fiduciary advisor (not a broker) and to guide you every step of the way in fulfilling your fiduciary obligations. We'll provide the ongoing oversight for your 401(k) plan's investment menu to ensure compliance with ERISA rules and offer professional financial guidance for you and your employees to pursue your long-term retirement goals.

Here are just some of the services included in our program:

- **3(21) Oversight Protection**
- **Written Co-Fiduciary Acknowledgement**
- **Professional Investment Committee Oversight**
- **Investment Policy Statement**
- **Investment Menu Evaluation Monitoring and Methodology**
- **Quarterly Investment Portfolio Review and Reporting**
- **Comprehensive Annual Benchmarking Report**

By partnering with Investmark, you'll get the support that your 401(k) requires to avoid putting your business and employee's futures at risk. With our fiduciary and regulatory expertise behind you, you'll also be confident that you're meeting all the requirements of the latest DOL legislation and have more time to focus on your business.

Contact us TODAY for a complimentary consultation and detailed benchmarking report of your existing 401(k). Call Retirement Plan Services Advisor Drew N. Bowman, AIF® at (203) 953-3777 or email dbowman@investmark.net for more information.

We look forward to speaking with you!

Investmark Advisory Group

STRATFORD ♦ STAMFORD ♦ GLASTONBURY

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