Investmark Advisory Group
Fiduciary Retirement Plan Services

Our Commitment to Outstanding Service Makes It Easy to Start and Manage Your Company's Retirement Plan

We Keep It Simple

- Your dedicated point of contact will guide you through all the steps and will work with you to handle all the administrative items
- Regular status calls to ensure timely implementation
- We come to your location(s) to explain plan options and help your eligible employees throughout the enrollment process.

Experienced Retirement Advisors

- Our Accredited Investment Fiduciaries®(AIF®) have the expertise to ensure your plan's investment management process meets the appropriate fiduciary standard of care.
- We provide ongoing education based on your unique business needs to help employees better understand their plan benefits and improve their retirement readiness

Transparent Fees

- One easy-to-understand fee that is clearly stated in your plan documents

Ongoing Plan Administration

- Our Retirement Plan Services partners will keep you updated and well-informed of plan operations
- Guidance for effective administrative policies and processes

Get Your Employees Ready for Retirement

- We'll talk with your employees to help them understand how they can use the plan to help prepare for retirement.

Investmark Advisory Group

STRATFORD ♦ STAMFORD ♦ GLASTONBURY

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WE'RE WITH YOU ALL THE WAY

Investmark's Retirement Plan Services understands that your business is unique. We take the time to understand your needs, help clarify your goals and make sure that your plan is in sync with your objectives. Our experienced, dedicated Accredited Investment Fiduciary Advisors (AIF's®) and our outstanding Retirement Plan Services team will be there to help you get your plan off to a great start, monitor your progress, keep you up to date and informed as your plan grows, and help keep you in compliance with all state and federal regulations.

Plan Development

INFO GATHERING

- Introduction Call with AIF® Advisor
- Review Plan Goals and Objectives

PLAN CREATION

- Determine appropriate strategies
- Record and review census data

DOCUMENTATION

- Employee information and notices

Plan Rollout

ENROLLMENT

- Meeting on site with employees
- Educational presentation
- Individual employee meetings

PAYROLL ADMINISTRATION

- Consult and instruct on payroll deductions
- Ongoing payroll support

Your Plan Goes Live

ONGOING SUPPORT

- Experienced Retirement Services Team
- Frequent advisory contact
- Educational info
- Responsive, personalized service

INVESTMARK®
The Direction *of* Wealth

Call 800-443-1006 to talk about getting *your* plan started.
You can also visit us online at *www.investmark.net.*