PLAN OPERATIONS

Plan Forward

We build on the foundation built from our Annual Fiduciary Program with a "Plan Forward" strategy, ensuring continuous improvement each year. This proactive approach enhances your plan annually, positioning participants better for retirement each year.

Creating a place to save

1 BASICS

- Strategic importance to the organization
- Operate plan in compliance with plan document
- Understand and address compliance testing
- Develop audit level internal controls
- Establish ownership of compliance and oversight

2 PROCESS DEVELOPMENT

- Establish oversight philosophy / process
- Review savings health
- Review participant engagement / needs

Nurturing the foundation of the plan

3 TAKING ACTION

- Assessing our vendor
- Development of investment architecture
- Address participant savings rates

Adding growth

4 OPTIMIZING OUTCOMES

- Align design with human capital strategy
- Participant needs near and into retirement

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