NATOMA WEALTH
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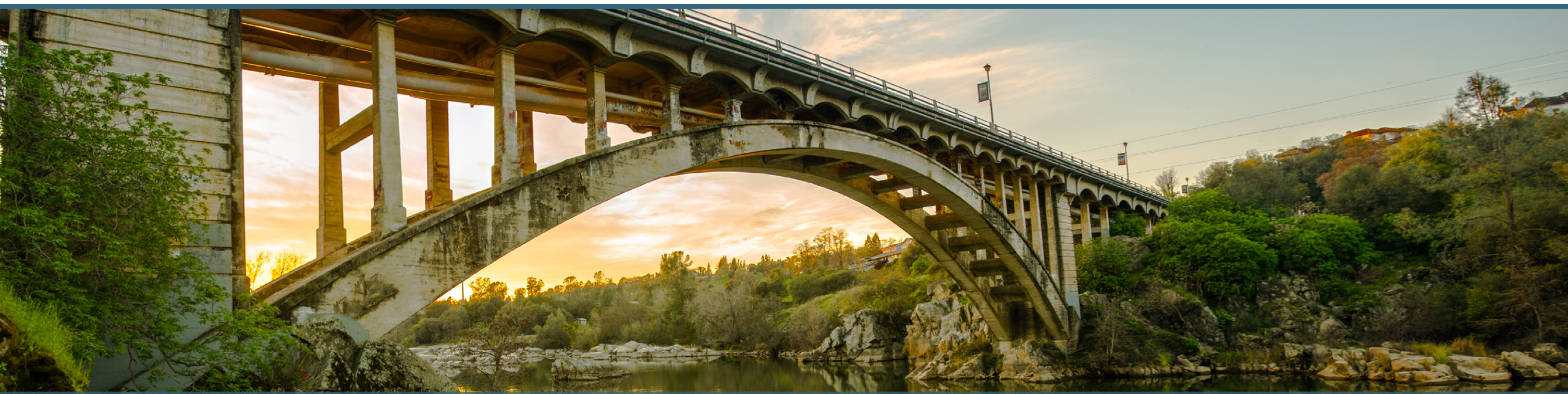

Employer Sponsored Retirement Plans

Employer-sponsored retirement plans help businesses to attract, retain and reward valuable employees. However, the responsibilities of sponsoring a plan can be complex, time-consuming, and difficult for a business to execute on its own.

At Natoma Wealth, we leverage the knowledge and resources available through our award-winning, in-house retirement plan specialists.

Our experienced team will review and assess your entire plan and the investments offered, as well as help you identify new opportunities and develop a participant education plan.

Our Services

We deliver full-service consulting on all types of employer-sponsored retirement plans.

OUR AREAS OF FOCUS INCLUDE:

- PLAN GOVERNANCE, COMPLIANCE AND FIDUCIARY REQUIREMENTS
- EMPLOYEE EDUCATION AND FINANCIAL WELLNESS PROGRAMS
- FEE AND SERVICE BENCHMARKING
- VENDOR MANAGEMENT AND CONTRACT NEGOTIATIONS
- PLAN DESIGN CONSULTING

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Benefits

- A tailored, comprehensive participant education and communication strategy aligned with your organization's goals
- Independent fee and service benchmarking to help ensure that plan costs are reasonable and competitive
- Experience in plan design consulting, audit support, administrative procedures, legal notices, and mergers and acquisitions
- Ongoing recordkeeping support to help ensure your plan meets regulatory and fiduciary requirements
- Fiduciary training to ensure that you understand your responsibilities and stay up-to-date on key legislative and regulatory topics
- ERISA 3(21) and 3(38) oversight
- Proactive examination, analysis and documentation processes to help ensure that plan goals and objectives are being met, including the development of an Investment Policy Statement, quarterly investment monitoring, and maintenance of Committee minutes documenting diligence and decisions

Plan Participant Education

Employee education is a cornerstone of our service offering. We strive to help your employees understand the investment options available to them through your plan, as well as support their long-term financial wellness through continued education and support.

OUR MULTI-FACETED APPROACH INCLUDES:

- Education on available plan investments
- Educational webinars on retirement-related topics
- Participant investment allocation support
- In-person, group and 1-on-1 meetings
- Phone and email support for 1-on-1 investments advice
- Financial Wellness education and resources

Contact Natoma Wealth today to learn how we can support you, your plan participants, and your company's retirement plan.