



PATHWAY PARTNERS

WEALTH ADVISORS

A COMPLIMENTARY
401(K) PLAN REVIEW
FOR BUSINESS OWNERS

HOW WELL DO YOU KNOW YOUR RETIREMENT PLAN?

Today's retirement plan
isn't just about investing
It affects....



Recruiting
Top Talent



Staff
Retention



Fiduciary
Liability



Administrative
Cost



Employee
Knowledge

EMPLOYER ADVANTAGE BENCHMARK REVIEW

A comprehensive retirement plan review



Fees

Benchmark fees against
similar plans to identify
potential savings.



Vendor Services

Evaluate recordkeeping,
support, technology and
overall service quality



Participant Engagement

Assess participation levels
and overall employee
engagement



Investment Lineup

Evaluate quality, diversity
and performance of current
investment options



Cash Balance Plans

Explore retirement savings
strategies for business
owners.



Employee Education

Review resources and
education available to your
employees



Fiduciary Process

Review fiduciary process
and documentation.



Recruiting & Retention

Assess plan features related
to recruiting and retention.



Plan Design

Analyze match formulas,
vesting and design features.

 **Did you know** that your
retirement plan may not
have to stay with your PEO?

You may be able to utilize an independent
retirement plan provider while continuing
to use your PEO for medical, payroll and
other HR services.

LET'S CONNECT!

Reach out to schedule
your complimentary,
no obligation review.



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