Corporate Services

Unparalleled support for your executives and employees

From the boardroom to the mailroom, today's employees face many financial challenges: delayed retirement, student loan debt, high taxes and estate planning—just to name a few. And more and more, they're looking to their employers for support. But not just any support.

Employees want access to objective financial professionals who can help them take control of their financial lives, manage their wealth and retire with confidence. That's Cerity Partners.

Three services. One goal. Your employees' financial well-being.

Executive Financial Counseling

- A unique benefit for senior management
- Comprehensive financial planning
- Benefits and compensation planning
- Ongoing program management and reporting

Financial Wellness Coaching

- One-on-one guidance for all employees
- Financial wellness portal
- Customized educational programs
- Ongoing program management and reporting

Retirement Plan Services

- Comprehensive plan assessments
- 3(21) or 3(38) investment fiduciary services
- Qualified and nonqualified custom plan design
- On-site plan & investment reviews

These services not only position your employees for success but you as well. They give you a competitive edge for recruiting and retaining top talent at all levels of your organization. Plus, more importantly, they improve productivity—less financial stress makes it easier for employees to focus on their work and your strategic goals.

Experience a *better* approach to financial service.

All the experts. One point of contact. Comprehensive financial advice, tailored to you.

Visit ceritypartners.com to learn more.