

With hundreds of retirement plan advisors to choose from and many offering the same or similar services, how do you know which firm is right for your organization?

To answer this question, you need to ask a couple more. Can the advisor reduce your organization's fiduciary risk and increase retirement readiness? Will they act solely in your best interest and that of your employees?

At Cerity Partners, "best interest" is more than a mantra or legal requirement, it's the core of what we do. Our approach centers around four factors designed to provide a premier plan for your employees while limiting your fiduciary responsibilities:



Investment Objectivity

We serve in a fiduciary role, so you can trust our recommendations are aligned with your employees' retirement needs and objectives, not our own interests.



Fiduciary Protection

We can reduce and potentially eliminate some of your fiduciary obligations by serving as a 3(21) or 3(38) investment manager. Plus, we'll assess the reasonableness of your plan fees and recommend comparable lower-cost solutions where applicable.



Modern Plan Design

Through comprehensive reviews, we'll help maximize your plan's effectiveness by identifying opportunities for improvement and implementing best practices to increase participation, boost contributions and drive better results.



Financial Wellness

Our education goes beyond online portals. Your employees and executives have access to one-on-one personalized advice from a dedicated advisor who can help them address current financial needs and plan for the future.

Secure retirements begin with a sound and effective plan.

To receive your complimentary plan analysis, contact us at info@ceritypartners.com.

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