

Retirement Plan Services

Why switch?

Transparency.	<i>Full fee disclosure. No hidden fees.</i>
Low Cost.	<i>Below industry averages; free to use all platforms (including open arch.). No revenue sharing or kick-back arrangements.</i>
Protection.	<i>We act as your advisor and fiduciary to the plan.</i>

You focus on your business. We'll focus on your retirement plan.

How do you change?

	<u>Your Time Required</u>
1.) Review your current contract	None
2.) Meet with TPA and discuss your goals of the plan <i>(Optional)</i>	30 min
3.) Present Proposal <i>Includes draft Investment Policy Statement, Plan menu, total costs, etc.</i>	30 min
4.) Convert Plan <i>Mapping plan funds, providing participant notifications, drafting and Implementing Investment Policy Statement</i>	30 min
5.) Participant communications <i>Includes participant education and communications, and individualized sessions with all participants</i>	None

Our transfer process is smooth and preserves your time.



BEACON HILL
INVESTMENT ADVISORY