

RETIREMENT PLAN FIDUCIARY MATRIX



Managing a successful retirement plan doesn't have to be difficult. By understanding each person's responsibility, you can learn how to make better decisions.

..... Level of Responsibility



Let us help you focus on what really matters. Terms Explained

Our advisors can accept fiduciary status as a 3(21) Investment Advisor or a 3(38) Investment Manager.

3(16) Plan Administrator
Plan sponsor delegates administration of the plan to help ensure ERISA compliance.

3(21) Investment Advisor
Plan sponsor and advisor share fiduciary responsibility for investment decisions.

3(38) Investment Manager
Plan sponsor delegates all responsibility for investments decisions.



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