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[Schedule a Time](#)



How to protect your business

Following these simple steps could help keep you and your company out of hot water:

- 1) Review your 401(k) plan cost at least annually
- 2) Have a process for monitoring plan investments
- 3) Competitively bid your plan every 3-5 years
- 4) Maintain up-to-date meeting notes with a completed annual ERISA Fiduciary Checklist

Remember –

ERISA regulations clearly state that if you're not an expert in 401(k) plan administration or investment management, that's ok. But you should seek expert advice from those who are to ensure compliance and avoid penalties.

Think expert advice is too costly? Think again.

Schedule some time for a complementary discussion of your objectives and a clear description of our flexible service model, that many times includes no direct cost to the employer.



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