

## Building a Successful Retirement Plan

A retirement plan can be overwhelming. But it doesn't need to be. Use an experienced financial professional whose every day focus is retirement plans, so things can be easier. TriBridge Partners is your answer. We can help you build a successful retirement plan for your business and employees – *building a bridge between today and tomorrow.*

### Customized, Comprehensive and Flexible

As we work together, you'll decide how you'd like to team with us. We can be more involved helping you manage your plan or less. Whatever you prefer, you'll receive personalized retirement plan guidance.

To lay the groundwork for your plan, our team needs to understand your needs:

- **We examine:** your company, retirement plan objectives, and employees
- **We review:** your current plan's providers, features, and investment options
- **We look for:** opportunities to improve or best start your plan

Once we understand your goals and how you'd like to partner, you'll receive plan guidance and plan coordination for compliance, investments, plan design and education.

### Order, Strategy and Assessment

So you can focus on your first priority – your business – we take work off your shoulders by setting-up the right plan. We'll benchmark your plan to ensure it's effective and working for you. Whether you currently have a plan or start a plan, we'll help you establish a disciplined due-diligence process for monitoring the plan.



Bringing you our best ideas



Helping you design an optimal plan



Supporting you to develop a cost-effective program



Addressing plan risks and overseeing fiduciary support



Taking work off your shoulders

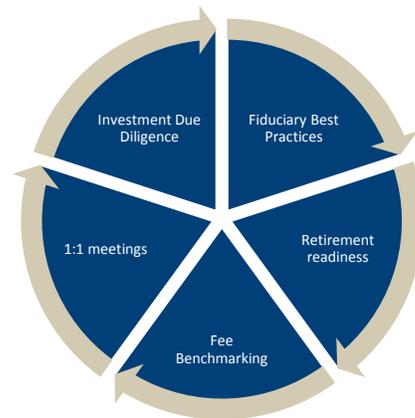


A successfully designed retirement plan includes a **regular evaluation process**. This includes independent benchmarking of your investment options, investment selection, total plan expenses and following the Department of Labor's fiduciary rules. With an **ongoing process**, we'll review your plan to ensure it's consistent with your goals and changing needs

## Effectively Use Your Plan

Plan design is key to a successful retirement plan. You'll have the cutting edge to ensure your plan is effective and your employees have the best opportunities. For example, auto enrollment features and a diversified fund menu can be used to ensure your employees are on track to achieving retirement success.

The success of your plan hinges on the level of employee participation. Working with us, your employees will understand how they can use the plan to pursue their retirement investing goals.



### Our Relationship

Your unique goals and objectives are our focus. By working together, we're committed to always doing what's in your best interest. You can expect us to act with these four keys top of mind:

- 1 **Respect:** For you and your employees
- 2 **Integrity:** To always do what's in the best interest of your employees and the plan
- 3 **Passion:** To help employees set goals and develop a road map to achieve their retirement targets
- 4 **Giving:** Whether it's time or money, giving back to the community is a way for us to impact lives in greater numbers

### Our Approach in Action

The Client	Challenges ...	Working with TriBridg Partners = Results!
Manufacturing company with 400 employees and a 401(k) plan	<ul style="list-style-type: none"> <li>• High cost</li> <li>• Lack of employee education and engagement</li> <li>• Employees frustrated with overall plan management</li> <li>• No fiduciary process</li> <li>• Underperforming custom portfolios</li> </ul>	<ul style="list-style-type: none"> <li>• Lowered fees.                             <ul style="list-style-type: none"> <li>- Consulting fees reduced by 43%</li> <li>- Recordkeeping lowered by .02%</li> <li>- Investment expenses down .06%.</li> </ul> </li> <li>• Added 1-1 education.                             <ul style="list-style-type: none"> <li>- Nearly 30 employees increased their deferral by an average of 3.98%.</li> <li>- 9 employees enrolled.</li> </ul> </li> <li>• Implemented a consistent fiduciary process to monitor fees and investments.</li> <li>• Added Target Date Investment Options, a much better fit for employees, as the QDIA.</li> </ul>

### Build a Bridge to Tomorrow

When it comes to retirement plans, focus on what you do best; your business. Let us help by focusing on the rest. We'll team with you to provide an optimal retirement plan experience.



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