Expand Financial, LLC.

***e*Fiduciary Advisor (*e*FA)**

Easy to Use | Comprehensive | Outsourced

Retirement Plans Need Help!

As an Investment Advisor are you trying to find an efficient way to help advise retirement plans? Are you looking at delegating the complex duty of investment management for those retirement plans? It's time to expand your horizons and go after those plans that need your help and we can help you do it!

Service Benefits

- Comprehensive Review of Current Plan:
    - Plan Design
    - Costs
    - Investment Selections
- Investment Management Fiduciary Delegation
    - 3(21): Investment Consultant or
    - 3(38): Investment Manager
- Plan Committee Support
- Easy to Use Investment Approach for Participants
- Ensure Plan Providers Are Cost Competitive
- Assist in finding best of breed support partners
    - ✓ Third Party Administrator
    - ✓ Custodian
    - ✓ Record Keeper

System Features

- ✓ Investment Policy Statement (IPS) Creation
- ✓ Investment Selection and Monitoring Documentation
- ✓ Best Practice Investment Line-Up Creation and Monitoring
- ✓ Quarterly Monitoring Reports Against IPS
- ✓ Level Compensation

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