

# Group Retirement Plan Services

Starting a small business retirement savings plan can be easier and less expensive than most business people think. What's more, there are a number of retirement programs that provide tax advantages to both employers and employees. At **Wisconsin Benefit Planning, Inc.**, we have a team of experts ready to help you design a plan to fit you and your employees' needs. Whether you already have a plan or you are looking to start a new plan, we can help find the right combination of plan features to fit your needs.

## **CUSTOMIZED PLAN DESIGN TO FIT EMPLOYER NEEDS**

- Review Goals and Suggest Remedies and Strategies
- Suggest Plan Design alternatives focusing on options that may favor highly compensated and/or longer term employees.
- Provide updates on legislative and regulatory issues to help insure compliance & fiduciary responsibility
- Knowledge of all types of retirement plans

## **INVESTMENT SELECTION & DUE DILIGENCE**

- Help establish and maintain a written investment policy statement
- Wide variety of Investment options
- Review of plan investment array annually for diversification, performance, expenses, risk and manager conduct

## **ADMINISTRATIVE REVIEW & SELECTION**

- Service Provider search and selection
- The appropriateness of bundled vs. unbundled approaches
- Help find the right administrator based on services, expertise, expense, quality and consistency of reporting, and administrative support.

## **EMPLOYEE EDUCATION**

- Provide personalized assistance to plan participants
- Conduct semi-annual employee enrollment and educational meetings
- Help coordinate service provider involvement when needed



## **Wisconsin Benefit Planning, Inc.**

*Your Health and Life Insurance Specialists!*

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