



## Advisory Services

### Fully Customizable Solutions



### Objective Approach



### Personal Service



### In-House Actuaries



### Bilingual English/Spanish

#### Advice You Can Trust

Retirement Solution Group, LLC is the independent retirement plan consultant of choice for smaller to mid-sized companies. RSG's Advisory Services are designed to help you to:

- Understand and select the most appropriate plan and fund options
- Comply with all Dept. of Labor and IRS requirements
- Fully leverage available tax benefits
- Successfully educate and enroll participants
- Conduct informative and complete fiduciary meetings with Trustees

#### An Independent Voice

RSG is an independent voice in an industry fraught with secondary agendas. We are not product pushers. Period.

Our approach is to find out what questions, problems and goals you, your firm and your plan may have. We then work to solve those complex issues with whatever tools best address your needs:

*Are you trying to get an increased tax deduction?*

*Are you trying to increase participation?*

*Does your plan cost too much?*

*Is your plan not being serviced enough?*

*Are you or other key employees exposed to unnecessary fiduciary risk?*

**There is rarely just one answer, but there is always one right answer.**

#### Free Plan Analysis

We engage most relationships with a free independent plan analysis which will be a valuable tool for any trustees' due diligence file. This is at no obligation or cost. It is designed to demonstrate our knowledge and service level. Once confidence and trust have been established, we then work with you to fulfill what your business needs and wants. Our clients frequently tell us how they appreciate our direct, open and frequent communication.

Knowledge + Service + Commitment = RSG





## R E T I R E M E N T   S O L U T I O N   G R O U P ,   L L C

### Comprehensive Retirement Benefit Plan Advisory Services

RSG provides expert, product-agnostic advice to small to mid-sized retirement benefit plans across 10 states. With all of the choices, options, and risks out there, isn't it comforting to know that a trusted, experienced partner is looking ahead for your business, always there to help you address critical plan choices and requirements, including:

- Vendor Selection
- Fund Selection
- Investment policy statement
- Fiduciary/ERISA 404 Compliance
- Participant education/enrollment meetings
- Plan review/Trustee meetings

At RSG, we're entirely focused on Retirement Plan services. If you're searching for a plan that's right for your business goals, or need help with plan review, enrollment, education, or communication, we're here, ready to put our expertise to work for your business.

### About Retirement Solution Group

Retirement Solution Group, LLC, is a retirement benefits consulting practice specializing in Advisory, Third Party Administration (TPA) and Consulting Services for small to mid-size retirement plans.

Blending our large plan experience (Boeing, Kodak, Chevron, and 3Com) with our consulting services background (Ernst & Young, Deloitte & Touche, and the Fusion Group), we're uniquely equipped to meet the needs of small to mid-size retirement plans.

We work with you to determine an appropriate service model, utilizing full fee disclosure, for services ranging from specific project work to full service program design, support and administration.



Retirement Solution Group, LLC  
180 W. Washington Street | Suite 200 | Chicago, IL 60602

ph 866 | 352 | 7731  
fx 312 | 245 | 9513

[info@retirementsolutiongroup.com](mailto:info@retirementsolutiongroup.com)  
[www.retirementsolutiongroup.com](http://www.retirementsolutiongroup.com)