



Consulting Services

Fully Customizable Solutions



Objective Approach



Personal Service



In-House Actuaries



Bilingual English/Spanish

The Independent Choice For Smaller & Mid-sized Plans

Retirement Solution Group, LLC is the independent retirement plan consultant of choice for smaller and mid-sized retirement plan managers. RSG's Consulting Services are designed to help you with both one-off projects and major business challenges:



A Unique Focus & Targeted Expertise

While it is true that there are many areas within financial services where "generalists" reign supreme, the qualified plan world is not one of those.

This highly governed and highly specialized business requires customized solutions that maximize the benefits for participants, companies and the trustees who oversee them. At RSG, our sole focus is retirement benefit plan consulting services.

Due to ERISA restrictions, DOL governance, IRS rules, Prudent Man standards, and many other restrictions and opportunities, the retirement plan industry is one where we feel clients benefit greatly from the solid niche expertise that we are able to offer.

An Independent Voice

While others focus on cost or value, investments or communications, we deliver client specific customized solutions focused on need, not products. We're an independent voice, responsible only to your agenda and your success.

Through the industry's most personalized service, we'll partner with you to deliver the best solutions available based on our decades of experience in the retirement benefits industry.

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 Consulting Services

RSG can help you address virtually any benefit plan challenge your firm, plan, Trustees, or participants are facing, including:

- One-off projects
- Plan terminations
- Audit assistance with Dept. of Labor, IRS, etc.
- Benefit studies
- Enrollment services
- Plan mergers & Acquisitions
- Voluntary compliance filings
- Fund performance review/selection
- Human Resources administration

We welcome your inquiry, no matter how large or small the scope of your challenge.

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 and 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 plan Trustees.

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.



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