



CHERRY BEKAERT WEALTH MANAGEMENT

Retirement Plan Consulting

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Cherry Bekaert Wealth Management offers clients thoughtful, attentive retirement plan consulting provided by a team of experienced and objective professionals. Through years of experience in advising professionals, executives and businesses, Cherry Bekaert Wealth Management has identified the most common retirement plan consulting needs. Accordingly, our retirement plan advisors will work to understand your needs and answer the questions most important to your company.

Mission Fulfillment

The retirement plan a company offers its employees is not only a benefit of employment, but an opportunity to further demonstrate and communicate your mission, values, culture and shared goals.

Let's Discuss

- ▶ Why your company offers a retirement plan
- ▶ How your company's retirement plan supports your mission

Let's Consider

- ▶ Designing and aligning the plan with your company's values
- ▶ Communicating the plan as an extension of the company mission as well as educating sponsors, trustees and participants
- ▶ Evaluating, maintaining and updating the retirement plan to consistently serve your company's mission

Retirement Readiness

Together we will focus on creating the right stream of monthly income for retirement because we understand that growing the biggest nest egg isn't always the end goal.

Let's Discuss

- ▶ Your plan's primary objective
- ▶ Whether your plan is actually preparing your employees for retirement
- ▶ If your employees are ready to retire

Let's Consider

- ▶ Plan design and making it easy for your employees to participate effectively
 - Auto Enrollment
 - Auto Increase
 - Regular Success Measure Evaluation
- ▶ Education
 - Quarterly Retirement Planning Newsletter
 - Annual Participant Education Meetings
- ▶ Communication
 - Statement design highlighting key indicators of retirement readiness
 - Interactive online planning tools

Fiduciary Excellence

Faithfully acting in the best interest of our clients through values-based service earns trust and naturally helps mitigate liability. We will provide values-based service to you and assist your company in providing the same to your employees.

Let's Discuss

- ▶ The benefits of fiduciary duty
- ▶ The realities of fiduciary liability
- ▶ If your company is ready for a Department of Labor audit of your retirement plan

Let's Consider

- ▶ Drafting an Investment Policy Statement (IPS) that can be implemented and documented to reflect the company's mission, values and purpose
- ▶ Maintaining sustainable processes to adhere to and document fiduciary excellence
- ▶ Keeping a complete and updated fiduciary audit file

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About Cherry Bekaert Wealth Management

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