

Employer Plan Consulting can help you build a skill set that will earn you new business and support your ongoing service to existing employer plan clients.



Prospecting

We will help you evaluate opportunities, provide marketing materials, and help you anticipate frequently asked questions. Our prospecting experience and insight will give you the edge to land your next retirement plan client.



Provider oversight

Plan sponsors may need guidance making an informed decision about the reasonableness of their plan's services, fees, and investments. Employer Plan Consulting can help document a thorough review of their current service provider and order proposals from other providers.



Investment analysis

Whether you're looking for access to investment analysis tools, fund scoring, suitability, or return reports, our team, with access to RPAG, can provide support. Our integrated partnership allows you to deliver timely reviews, empowers you to help plan sponsors fulfill their fiduciary obligations, and keeps outsourced investment managers accountable to their processes.



Education

Employers expect financial professionals to lead engagement and education efforts for their employees. Our resources enable you to lead engagement efforts and conversations, while our Fiduciary Fitness program for plan sponsors and administrators helps them better understand their fiduciary roles. We also offer support for emerging plan professionals looking to step up their ERISA knowledge.



ERISA expertise

Leverage our ERISA knowledge and experience to ensure that your service model is reflective of industry best practices. Adhering to developed best practices will help you prospect for new retirement plan clients and serve your existing clients with confidence.



Business management

Retirement Plan Advisory Group (RPAG) was designed, built, tested, and optimized to provide you with the efficiency, scale, reporting, and data that you need to successfully manage and grow your employer retirement plan advisory business. Contact us with questions on RPAG.