MY 401(k): SECOND OPINION SERVICE

Offered by Entrust Financial LLC®

As a business owner you have a lot to do and probably prefer to spend your time pursuing your passions, instead of devoting time to regulatory housekeeping for your company 401(k) plan. Perhaps, too, the demands on your time have prevented you from maximizing the benefit of your retirement plan—for yourself and your family, as well as for your valued employees.

We designed our **My 401(k): SECOND OPINION SERVICE** just for you. It works something like this:

- **We schedule a meeting to discover where you are now**. For instance, we would like to understand your business, your goals—professional and personal, and become familiar with your existing 401(k) plan.
- **This conversation might uncover gaps**, such as: unmet fiduciary responsibilities, a disconnect between your personal retirement goals and your progress towards meeting them, a lack of understanding on the part of your employees regarding the superb value and long-term benefit your program provides them.
- **We then formulate a plan for you to delineate the steps you may need to take to ensure that you are:** 1) confident you are meeting your fiduciary responsibilities; 2) comfortable that your plan structure meets your needs and those of your employees; 3) familiar with several 401(k) providers to identify best pricing for the plan you need; 4) using an investment platform that is geared toward meeting your needs and those of your employees.

If you would like to ensure that you are meeting your fiduciary responsibilities while achieving your most important professional and personal financial goals, and supporting the needs of your employees, **MY 401(k): SECOND OPINION SERVICE** may be just what you need. Schedule your complimentary conversation now by contacting our Entrust team: contactus@entrustfinancial.com