



# What to expect

## The 401K Benchmarking Process.

Comparing your plan to industry standards is an important step in the fiduciary process. It is a way to document that your plan offers the value expected for the costs incurred.

Our planning process typically consists of 4 phases:



Our goal is to offer the best service, professionalism, and educational opportunities with the least disruption to your current plan.

Please let us know if you have any questions.  
We look forward to meeting with you again!

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