



EQUITABLE



Time to review your 401(k) plan

offers a confidential, no-obligation plan review

You've got a lot of things on your plate.

There are the day-to-day operations like accounting, payroll and inventory management. Throw in hiring and managing employees, and it's no surprise that critical things, such as your company's 401(k) retirement plan, fall off your radar.

We're ready to help you get a clearer picture of the status and future of your 401(k).

How well does your current provider measure up?

Together, we'll analyze the fundamentals of your plan to ensure your goals and your employees' goals are in sight.

After a few years or more with your plan, you may have some questions.

- Am I receiving the level of service I require?
- How often should my financial professional review my plan with me?
- Am I comfortable in my relationship with my plan administrator?
- Does my current recordkeeper provide a dedicated service team for my employees and me?
- Am I confident that my employees understand and value their retirement plan?
- Does my plan provider offer my employees help to select their own investments?
- Do my costs reflect the value of my plan and plan support?

What's it like to work with me?

With support from the Equitable team, I will take care of the front end, the back end and everything in between by assisting with the setup, management and administration of your company's 401(k) plan. I will:



Provide concierge service to your business



Develop a customized plan based on your objectives and your employees' retirement goals



Manage the plan's setup and transition from start to finish



Provide in-person enrollment, education and plan promotion



Help you navigate today's regulatory environment with legal support



Provide independent, third-party registered investment advisory firms to act in the best interests of your employees

Let's get started. Schedule a confidential, no-obligation plan review today.

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