



Retirement Plan Consulting Services

PLAN SPONSOR REALITIES

Each year, employers continue to face mounting challenges:

- ⬆ Escalation of retirement plan litigation
- ⬆ Complex rules and regulations followed by increasing audit activity
- ⬆ Confusing service provider pricing
- ⬆ Increased financial stress in the workforce
- ⬆ Reduced support from retirement plan service providers

BENEFITS OF A PARTNERSHIP WITH ADVANCED CAPITAL GROUP

Our collaborative team provides advice based on decades of experience. We help you:

- ⬆ Reduce fiduciary risk through prudent investment and governance processes
- ⬆ Maximize ROI by reviewing provider services, features, and fees
- ⬆ Engage employees through measurable financial wellness programs
- ⬆ Implement industry best practices and strategic planning
- ⬆ Alleviate your team's workload so they can focus on critical business issues



AWARD-WINNING SERVICE

Advanced Capital Group is a consulting firm and Registered Investment Advisor (RIA) based in Minneapolis, MN. Our expert team uses a proactive and collaborative approach that enhances financial results for organizations and individuals.

Dedicated to bringing plan sponsors industry best practices, and helping to manage fiduciary responsibilities, while creating positive outcomes for participants.

Put our vision to work for you

We are passionate about fostering creative ideas and exploring new opportunities for our clients. Contact us to learn how a customized relationship can help you succeed.

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FIDUCIARY 3(21) INVESTMENT ADVICE AND 3(38) MANAGEMENT

When you engage us to collaborate and help manage your fiduciary responsibilities, you can count on us to:

- ▲ Provide innovative and customized investment research from our internal team of Chartered Financial Analysts (CFA®)
- ▲ Implement a comprehensive portfolio perspective through qualitative and quantitative investment selection and monitoring
- ▲ Apply best practices to investment policy statement development
- ▲ Conduct proprietary, onsite investment manager due diligence interviews
- ▲ Produce in-depth QDIA analysis including the opportunity to create custom portfolio solutions

PLAN GOVERNANCE AND COMMITTEE BEST PRACTICES

In our partnership we will provide a strategic approach to plan governance and best practices including:

- ▲ Annual strategic planning and goal setting
- ▲ Regulatory and compliance updates
- ▲ Education for executives, committee members and HR staff on fiduciary roles and responsibilities
- ▲ Oversight of service providers and recordkeepers



Our fee-only compensation means we aren't influenced by anything other than what is in your best interest.

COMPREHENSIVE PROVIDER SEARCHES, PLAN DESIGN AND FEE ANALYSIS

Our years of experience working with recordkeepers and a variety of plan types and designs, provides innovative insight to identify the right solution for your organization. We will:

- ▲ Identify your business goals
- ▲ Research and recommend plan design solutions
- ▲ Provide ongoing fee benchmarking to assess services and fees
- ▲ Manage and evaluate requests for proposals (RFP) and requests for information (RFI) with a detailed comparison and executive summary

PARTICIPANT FINANCIAL WELLNESS SERVICES

Financial wellness benefits can improve participant retirement outcomes.

- ▲ Develop strategies for participant success through actionable programs
- ▲ Measure ROI through proprietary analyses that use your plan's data to assess program effectiveness

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