



SYMPHONY
Retirement Partners, LLC



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Fact: ERISA plan fiduciaries have an obligation to determine whether they have the internal expertise in prudent plan governance **or engage those who would be considered “prudent experts” to assist them in this area.** You will be choosing your closest and most trusted ally to protect the best interests of your plan's participants, and therefore, to manage your fiduciary liability as a plan sponsor.

**CLICK HERE
TO SCHEDULE
A CALL**

Why Hire A Retirement Plan Consultant?

Specialization In Employer Sponsored Retirement Plans

Sponsoring a 401(k) or 403(b) plan is more than just time consuming and complicated, it also places legal responsibilities on you as the plan's fiduciary.

At Symphony Retirement Partners, LLC we help employers implement fiduciary practices, and assist plan participants with their retirement planning goals. We also help employers gain insight into the related fees and expenses of the plan, monitor performance and assist them in strategic plan design, so that highly compensated employees are able to save even more, if they so desire.

Given the expertise and specialization necessary to manage a plan, many plan sponsors choose to employ the services of an experienced and credentialed advisor, who can provide independent counsel.

Keep Your Existing Relationships

We do not require you to replace your existing retirement plan provider or third-party administrator; and will negotiate on your behalf if opportunities for improvement exist.

We Help You Navigate Your Responsibilities

- Plan Design To Meet Organizational Needs
- Fiduciary Support
- Improving Retirement Plan Participation & Retirement Readiness
- Resources for Selecting and Monitoring Investments
- Ongoing Plan Management
- Evaluating and Selecting an Appropriate Provider
- Analyzing plan level and participant level costs and benchmarking

Consulting Experience

- Number of years: 30+
- Plan size: Start up plans up to \$20 million in plan assets
- Employee size: 2 employees up to 500.
- Employer type: For profit and not-for-profit entities

Professional Industry Designations

- Accredited Investment Fiduciary (AIF®)
- Chartered Retirement Plan Specialist (CRPS®)
- Certified in Long Term Care (CLTC®)

Independent Counsel

Symphony Retirement Partners, LLC is an independent Registered Investment Advisory firm. We work directly for you and are compensated via a fee for our retirement plan consulting services.