Retirement Plan Savings

Today's employees are more financially savvy than ever. They expect the best in retirement benefit plans, including quality investment options and excellent service and support. For employers, retirement plans must be prudent and based upon disciplined, long-term objectives.

There are thousands of mutual funds and hundreds of retirement plan platforms. We offer retirement plan services to help you meet your fiduciary responsibility as an employer while providing a disciplined investment strategy to help your employees meet their financial retirement goals.

AS ADVISORS TO YOUR PLAN, CLARIS CAN:

- Provide an informed and independent recommendation for the retirement plan platform that best fits your plan objectives
- Recommend prudent, structured, low-cost investment options
- Design pre-allocated portfolios to achieve effective diversification
- Provide a written Investment Policy Statement for your plan
- Help the plan achieve 404(c) compliance
- Monitor the plan and recommend changes
- Provide plan level reporting
- Provide a full fee disclosure
- Serve as a liaison between your plan and its platform provider

Claris adheres to the Modern Portfolio Theory approach, which is based on decades of academic research. We are proud to be among a select group of Registered Investment Advisors (RIAs) approved to offer our clients Dimensional Fund Advisors funds.

As 3(21) and 3(38) fiduciaries, we work with retirement plan sponsors to build and manage 401(k), 403(b), 457(b) and defined benefit plans that fit your exact needs.

ASK YOURSELF THESE QUESTIONS

- Will I have enough money to retire?
- Which funds should I pick in my 401(k)?
- What is the right mix of investments for me?
- What is the best way to pay for college?
- Why do I need a will?
- Is my will up to date?
- Is my family protected if something happens to me?
- Do I need long-term care insurance?
- How do I select the right advisor?
- Will I owe estate taxes?
- What will happen to my business?

If you don't know the answer to any or all of these questions, contact a Claris Advisor today.

Are you ready to understand, invest, and relax?

Please contact Scott Iverson,CFP®, ChFC, CEBS, CRPS at 314-655-5573 or siverson@claris-advisors.com