

OPTIMIZE YOUR RETIREMENT PLAN

A SPONSOR'S GUIDE TO BENEFITS

WHY OPTIMIZE YOUR PLAN?

40%

Employees are 40% more likely to stay at an organization which offers a retirement plan.

70%

70% of employers say that offering a retirement plan has positively impacted their ability to recruit and hire talent.

63%

63% of workers at small (<50 employees) private sector firms lack access to a retirement plan.



YOUR PARTNERS WILL...



**DESIGN
THE PLAN**



**MAINTAIN
COMPLIANCE**



**MANAGE THE
INVESTMENTS**



**EDUCATE
EMPLOYEES**

50%

More than 50% of plan sponsors use a partner/fiduciary to outsource plan governance and oversight.

YOUR ROADMAP TO SUCCESS

1

Assess Your
Needs & Goals

2

Research &
Select Your
RPC Partner

3

Onboard &
Gather Data

4

Implement &
Communicate
with
Employees

5

Your RPC
Becomes a
Partner for
Success!

**READY TO OPTIMIZE
YOUR RETIREMENT PLAN?**

