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Retirement Collaborative LLC

Comprehensive Retirement Plan Service

Our comprehensive service follows all the steps outlined below in the Fiduciary Quality Management System. We offer integrated services using industry best practices that typically include plan design, investment advisory services, and participant education that coordinates with outside custodians, trustees and third party administrators that are selected for the plan.

Through the use of technology and partnership relationship with custodians, trustees and third-party administrators, we are able to offer an open architecture design that is normally only found in large institutional plans.

Our focus is on designing and implementing programs that help sponsors fulfill their fiduciary responsibilities and implement priorities to improve participation rates, reduce expenses, and optimize the mix of investment options for participants. We work closely with our clients to help them manage issues including investments, administration, and communications as they relate to their defined contribution plans.

Fees for our comprehensive service are determined on a per client basis and will be based upon the complexity of the services provided. We offer a flexible fee structure, whereby you may select either hourly, fixed fee, or an asset based fee structure. Prior to entering into our advisory agreement, we will provide you with a proposal that outlines the services we will offer along with the corresponding fee. Should the proposal be accepted, we will draft an advisory agreement. The advisory agreement will contain the information detailed in the proposal along with termination provisions.

We offer free, no-obligation consultations to all prospective clients. To schedule a meeting, please go to the Contact Us section of our web site or call us at 717-395-9380.