

Retirement Plan Services

PLAN CONSULTING AND WEALTH MANAGEMENT

As a business owner, you understand that your people are your greatest asset. Having a great retirement plan is one of the best ways to attract and retain top talent. Providing a quality retirement plan and promoting financial wellness creates happy employees - and happy employees are more productive, which helps increase profitability. That's a win-win for everyone!

That's why Aprio's Retirement Plan Services team puts your employees at the center of the equation. We provide comprehensive services that include plan design, employee education, strategic advisory, and of course compliance.

We work closely with clients to maximize the value of their retirement plans and make it easier to offer this important benefit. Let us help you make your retirement plan a cornerstone of your employment brand that can help you grow your workforce and your business.

Aprio Retirement Plan Services include:



Financial wellness - By offering ongoing financial education and communications, we help employees move beyond participation to craft individual retirement savings strategies.



Strategic Advisory - We support you through plan reviews, investment selection and monitoring, and more. For clients where we are serving as the plan's investment advisor, we provide direct employee access to an advisor to answer general questions about their investments.



Administration - Aprio¹ provides a full suite of compliance services such as plan testing and Form 5500 filings and comprehensive plan design consulting. We keep you and your plan committee informed and on track through scheduled administration calls, activity reports and easy to ready status reports.



Cost Controls - We help you manage plan costs through market analysis and regular benchmarking. We diligently work on your behalf to reduce plan fees.



Investment Advisory² - We work with you to craft your investment policy statement and provide easy to read reports that help educate and guide your plan committee to make smart investment decisions.



Compliance - We can help you experience painless compliance management by handling plan amendments, filing your annual Form 5500, assisting with compliance testing and IRS, DOL and other government agency reporting. If the need arises, we're also here to provide IRS audit support.



For more information about Aprio Retirement Plan Services, contact:



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About Aprio

Since 1952, clients throughout the U.S. and across more than 40 countries have trusted Aprio for guidance on how to achieve what's next. As a premier, CPA-led professional services firm, Aprio delivers advisory, assurance, tax and private client services to build value, drive growth, manage risk and protect wealth. With proven expertise and genuine care, Aprio serves individuals and businesses, from promising startups to market leaders alike.

[Aprio.com](https://www.aprio.com)

1. "Aprio" references both Aprio Wealth Management and Aprio Benefit Advisors. Aprio Wealth Management and Aprio Benefit Advisors are separate entities. Plan administration services are provided by Aprio Benefit Advisors.

2. Investment advisory services are provided by Aprio Wealth Management.