



Plan Sponsor

Plan Participants



PLAN SPONSOR SERVICES

A successful retirement plan — is our passion.

PRIME Solutions Advisors, LLC is an independent investment advisor that provides fiduciary consulting and asset management services to plan sponsors and their plan participants. We deliver unbiased advice, innovative designs, sophisticated solutions, fiduciary risk management and experience-backed recommendations, all aimed at helping our clients improve their plans. We evaluate and mitigate a plan sponsor's risk while enhancing plan participants' potential retirement outcome and helping achieve financial security. Our services are designed to save time, potentially reduce fiduciary liability exposure and address both IRS and Department of Labor compliance requirements.

Through our value-added services and professional consulting expertise, we deliver on our mission each day to create ongoing successful retirement plan experiences for employers and employees. We address and satisfy the three key areas of a successful plan; plan governance, plan effectiveness and investment selection and monitoring. We function as true independent consultants... we are both vendor and investment neutral.

Plan Governance

- Fiduciary Risk Management and Oversight
- Investment Policy Statement Development
- Annual Benchmarking
- Fee Analysis and Disclosure
- Investment Due Diligence
- Investment Committee Fiduciary Training
- Conduct Investment Committee Meetings
- Plan Design and Compliance Review(s)
- ERISA Soft Dollar Fee "Recapture"
- 404(c) Review

Plan Effectiveness

- Plan Design Review
- Participant Education Program
- Targeted Communication Program
- Participant Investing
- Measure Retirement Success
- Monitor Pre- and Post-Retirement Progress

Plan Investment and Monitoring

- Assess Investment Objectives
- Develop Asset Allocation Strategies
- Select and Monitor Investments (including expenses)
- Monitor Portfolio Performance
- Monitor Investment Expenses
- Conduct Disciplined Rebalancing Strategies
- Quarterly Communications to Investment Committee
- Organize and Monitor Documentation System

PARTICIPANT MANAGEMENT



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A comprehensive education and communication program is critical to a company's retirement plan success.

PRIME**Solutions** Advisors, LLC excels in designing employee education and communication programs that target different groups of workers, in different ways, inside your organization. Whether print, technology or in person, we craft a program so participants can save enough and invest well.

Helping participants adequately save and invest for retirement not only increases the likelihood of their successful retirement outcome, it also raises the profile and appreciation of their employee benefit.

Plan Success strategies include:

- Develop a complete education and communication program (including plan features).
- Conduct Group Educational Meetings (On-site)
- Conduct Enrollment Meetings by Licensed Advisors (On-site)
- Provide Individual Meetings on Financial Planning and Wealth Management (On-site)
- Develop Appropriate Asset Allocation Models based on Personalized Information

- Monitor the Progress of Participants in Both the Accumulation Phase and Post-Retirement Distribution Phase
- Monitor and Measure the Success of the Employee Education and Communication Program

PRIME**Solutions** Advisors also helps your employees accumulate meaningful benefits through:

Retirement Income Planning

Retirement Income Planning is the keystone to a secure financial future, be it your ability to retire comfortably, take the vacations you've always wanted, or give your children and grandchildren the education they dream of, it is always wise to seek the advice of a professional.

PRIME**Solutions** Advisors will focus on creating and implementing a prosperous investment strategy, one that is tailor made to reflect your evolving financial goals.

Wealth Management

PRIME**Solutions** Advisors utilizes a comprehensive Investment Management Strategy, which effectively combines our resources and our analytical skills. We rigorously screen and research investment opportunities for the criteria that best suits the individual clients needs, then select the most appropriate from a wide selection of nonproprietary, no-load/load waived mutual funds, as well as the broad bond and equity marketplace.

O U R T E A M



With over 50 years of experience, PRIMESolutions Advisors is a premier financial consulting firm, providing comprehensive retirement planning services for plan sponsors and plan participants. We are governed by a strict code of ethics and stewardship; and are committed to protecting and enhancing our clients' assets. Through ongoing education, state-of-the-art investment strategies and a strong sense of teamwork, we enter into a dynamic partnership with every client to best serve their retirement plan needs.

$$\text{Plan Success} = \frac{\text{Plan Sponsor}}{\text{Plan Participants}} = \text{Prime}$$

We are committed to your retirement and financial success!

A COMPLEMENTARY CONSULTATION

We invite you to contact us at for a complementary review of your financial and retirement goals. We'll discuss how our planning and management services can meet your exact needs.

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