

Stage 1

The Retirement Plan Evaluation

We provide a comprehensive evaluation of your corporate retirement strategy, based on your objectives and goals for the plan.

Stage 2

Fee Benchmarking Analysis

Using Fi360, an independent Fiduciary software, we produce benchmarking reports that provide key data points to determine if your current fees are in line with industry standards. Specific record-keeping, participant, and investment fees are all taken into consideration to produce a comprehensive and straightforward analysis.

Stage 3

The Plan Design Solution

Through our review, we will provide alternative solutions to create efficiencies for your retirement plan with regard to plan design, investment, & expense structures.

Stage 4

The Fiduciary Investment Process

Meeting your fiduciary responsibilities can be a complex process. We help control risk by developing a formal investment policy statement and establishing clear criteria for selecting and monitoring investment managers.

Stage 5

The RFP Facilitator

We're on your team. We'll sit on your side of the negotiating table to walk you through the RFP process, manage the flow of information, analyze and review proposals and guide you in making an informed and knowledgeable decision.

Stage 6

The Participant Focus

We help your employees through the enrollment process and offer continuous education on the benefits on their retirement plan with relevant communication materials and innovative presentations.

Stage 7

The Investment Monitor

We will help manage the ongoing health and welfare of your retirement program, advising you on industry changes, plan enhancements, and investment due diligence.

Why Shoemaker Financial?

If you're like many defined contribution plan sponsors, you may be looking for guidance from an objective source to help ensure that you're meeting your fiduciary obligations to plan participants. An increasing number of retirement plan sponsors are seeking outside assistance to help them deliver a higher level of fiduciary oversight of their plans' assets.

Shoemaker Financial offers independent, third-party investment advice based on 40+ years of providing guidance to plan sponsors. Shoemaker Financial serves as a consultant for qualified plans with the ability to provide the full realm of financial services to your organization. We advise businesses of all different sizes and plan types, including 401(k), 403(b), and defined benefit retirement plans. With 13 regional offices, over 100 associates and in excess of \$1.5 billion in assets under management, we have the resources to help you deliver success.



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