

# WHY AIPG

## RETIREMENT PLAN?

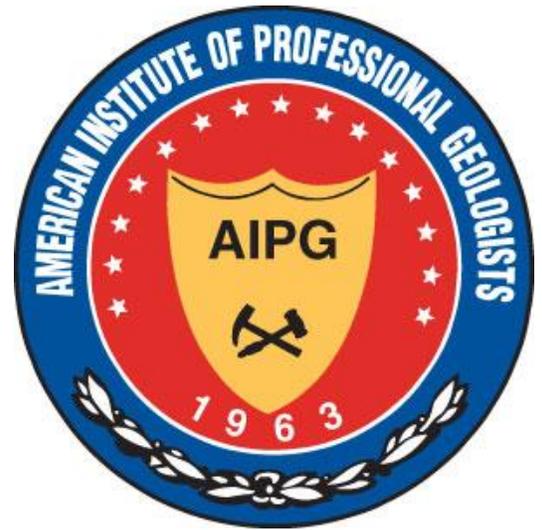
Owning a business is important to you, and supporting your employees' retirement goals is essential to your bottom line. That's where we can help.

### COMPETITIVE PRICING

Partnering with AssuredPartners gives you a knowledgeable team offering exceptional retirement program services with access to exclusive markets. You'll receive a customized plan to help manage your day-to-day administration at competitive costs. We provide a no cost benchmark report on all fees, investments and services as well as create a plan performance score so you can see how your plan is doing relative to others that are similar in size and in the same industry.

### BETTER PROTECTION

Get a personal, dedicated relationship with our boutique practice backed by one of the nation's largest qualified plan organizations, **Pensionmark**. You'll receive individualized strategies tailored to your organization from trusted experts that have your best interests in mind.



**Outstanding service to ensure your retirement plan's success.**

Empowered employees. Happier employers.

*Fiduciary protection  
as a 3(21) or 3(38)*

LEGISLATIVE  
SUPPORT

3(16) Services

**RISK MANAGEMENT**

**FINANCIAL**

**compliance guidance**

Fund selection & IPS

**WELLNESS PROGRAM**

**Plan consulting**

FINANCIAL  
ANALYSIS

**benchmarking & reporting**

**employee education & communication**

## HELPING YOUR EMPLOYEES ACHIEVE SUCCESSFUL RETIREMENT READINESS

Retirement plans can be complicated — but your employees don't have to know all the ins and outs. We'll provide a simple, relatable education and financial wellness program to better prepare them.

### + WHAT EMPLOYEES WANT

Understandable retirement program  
Pre-tax vehicle for savings  
Strong investment choices  
Affordable

### + HOW WE HELP EMPLOYEES

Group meetings  
Monthly webinars  
Spanish capabilities

### + HOW EMPLOYEES BENEFIT

Potentially improved retirement outcomes  
Enhanced financial literacy

### + HOW YOUR PLAN BENEFITS

Improved participant rates  
Increased employee deferral



**74% of employees say they feel financial wellness should be part of their employer's overall wellness program.<sup>1</sup>**

## EXCEPTIONAL & COMPREHENSIVE SERVICE

- ✓ **True retirement expertise:** 76 years combined industry experience and \$500 million in assets under advisement
- ✓ **Planning tools for your business:** We offer a retirement plan to your employees, reduce your administrative burden, transfer risks and reduce costs so you focus on running your business, not your retirement plan
- ✓ **Key Services:** investment support, customized pricing, participant education, participant notices, plan compliance and distribution and recordkeeping services

### AssuredPartners: One Stop Shop

- Group Retirement
- Individual Health
- Professional Liability
- Financial Wellness
- Property & Casualty
- Workers Comp
- Employee Benefits

**LET'S GET STARTED.** Contact me today to set up the plan and services right for you.



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<sup>1</sup>Four Seasons Financial Education: 2015 Financial Wellness Survey, April 2015