



Retirement Plan Services

CG Financial Designs, Implements and Maintains Retirement Plans Customized to Your Goals and Objectives

As independent fiduciary advisors, we can work with any retirement plan provider and will guide you through available options to meet your needs. Common goals can include maximizing the benefit to owners and employees, increasing employee financial wellness, reducing fiduciary liability, decreasing administrative burden, and maximizing fee transparency.

Benefits of Offering Retirement Plans

No matter what size your business is, providing retirement plans to employees has several advantages:



**Attract and recruit top talent
in a competitive market**



**Take advantage of tax
incentives for your business**

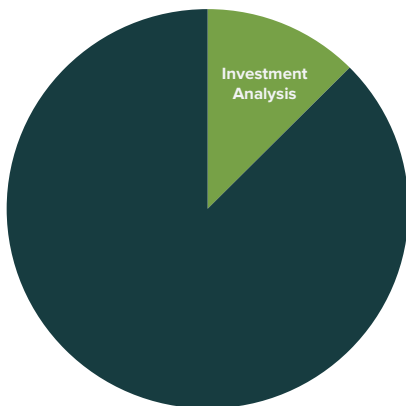


**Numerous available plan options
depending on your business'
complexity and needs**

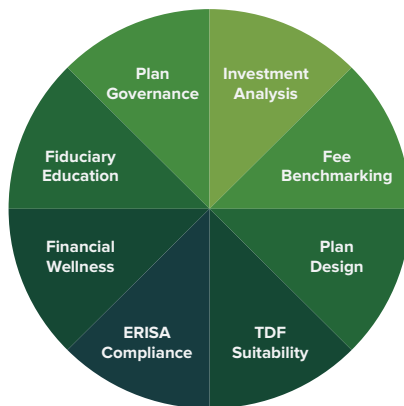
See the CG Financial Difference

Most advisors tell business owners the same story: "We can manage the investments of your plan and try to lower fees". But that's just the beginning.

Most Advisors



CG Financial Advisors





CG Financial Services

Our provider benchmarking process evaluates investments, costs, and services to find the right provider and plan for your business. Our approach to your plan isn't one size fits all - we're dedicated to crafting the plan that meets your needs, your budget, and your goals.

And once we do, we work with you to develop a service calendar, including meetings with your retirement plan committee and employees.

What You Can Expect from CG Financial



Independent Advisors

Agnostic to providers and fund managers so we can find the best fit for your business



Experienced and Credentialed

Over 200 employer-sponsored retirement plans



Unique Plan Designs

Matching structure, profit sharing and executive benefits, auto enrollment and auto escalation



Fiduciary Investment Monitoring and Review

Internal investment policy committee, investment policy statement, fund selection and monitoring



ERISA Compliance

ERISA 3(21) Investment Advisor and 3(38) Investment Manager capabilities



Employee Education

Financial educational resources for employees, including 1:1 meetings with plan participants



Plan Sponsor Education

Guidance for plan sponsors that includes webinars, monthly newsletters and a fiduciary fitness program



Documentation

Secure, web-based storage for plan documents, reviews, reports, meeting minutes and other pertinent data

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CG Financial has been a turnkey solution that helped us evaluate the investments, costs, and services of our retirement plan and find considerable cost savings. They have been highly responsive, and we count on their independent advice to continually help us benchmark and customize every aspect of our plan.

Vann Noblett, CFO
Gaston Day School

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Need help benchmarking your advisor?

Get in touch with our experienced team.
Info@mycgfinancial.com | (877) 807-2079
Monday - Friday 8:30 am - 5:00 pm

Advisory Services offered through CG Advisory Services, an SEC Registered Investment Adviser. Securities offered through Geneos Wealth Management Inc. Member FINRA/SIPC.

