CG
Financial
Services

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

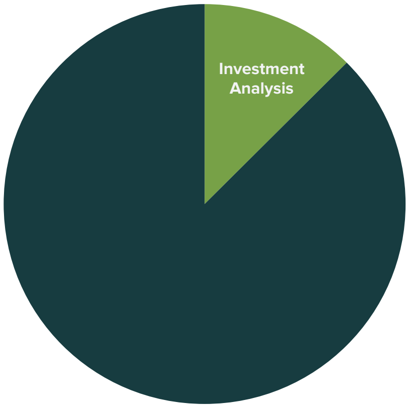
Take advantage of tax incentives for your business

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

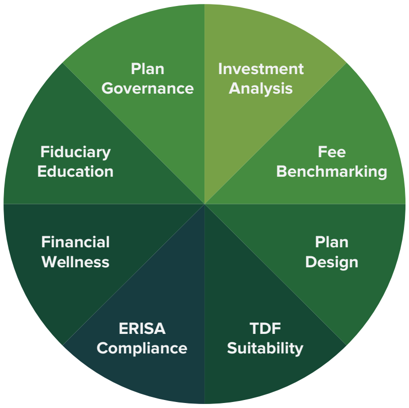
See the CG Financial Difference

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



Info@mycgfinancial.com | (517) 899-2357

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 fit's 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

Need help benchmarking your advisor?

Get in touch with our experienced team.

Info@mycgfinancial.com | (517) 899-2357

Monday - Friday 8:30 am - 5:00 pm EST