TOP 5 REASONS TO PARTNER WITH CG FINANCIAL SERVICES

CG Financial Services

1

SINGLE POINT OF CONTACT

You'll be assigned a dedicated point person from our credentialed service teams to foster immediate, efficient communication and problem solving. No frustrating call centers here!

2

CUSTOMIZED SOLUTIONS

We'll work with you to identify your unique needs, goals, and challenges to deliver a customized retirement plan solution that suits your plan best. One size fits all? Nope.

3

FULL TRANSPARENCY

When managing an investment in employees as significant as a retirement plan, you want an advisor that can function as your independent, objective fiduciary. We have your best interest in mind—we're not just pushing product.

4

DEFINING ROI

There's a lot of moving parts, right? Investment options, service providers, internal personnel, fiduciary obligations...You can leverage this burden onto us while we help you define your return on investment for offering this benefit.

5

SERVICE PROVIDER OPTIMIZATION

We can integrate with your service providers and vendors to streamline synergies and discover greater efficiencies. Through our benchmarking process, we often find considerable cost savings.

Working with us will ensure your retirement plan has a best-in-class investment lineup, your fiduciary liability is decreased, costs are competitive, and employees are receiving all the retirement benefits they deserve.

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