

The **ROADMAP** to a Better Retirement

401(k) & Other Defined Contribution Plans

Your employees need help saving for the future. But managing other people's money can be overwhelming. To meet your fiduciary responsibility, you need a benefits partner with a long-term vision and a deep understanding of the numbers. **Conrad Siegel Actuaries** can help.

WHY CHOOSE US

Conrad Siegel Actuaries & **Conrad Siegel Investment Advisors, Inc.**

Independent Advice

Conrad Siegel Actuaries is consultant-owned and operated. This independence lets us focus on your best interests—not those of financial institutions. Plus, our fee-based philosophy means you enjoy complete transparency with no hidden costs.

Shared Fiduciary Responsibility

As an SEC-registered investment firm, **Conrad Siegel Investment Advisors, Inc.** will stand with you as co-fiduciary. This makes us legally obligated to put your needs first. We also meet with fiduciaries regularly to review investment policy, fund performance, expenses, and employee education needs.

Year-Round Personal Service

You receive support and guidance from company owners or senior consultants on a year-round basis, not just when it is convenient for us. Our experts work behind the scenes to review compliance, monitor your plan's design, and make recommendations in your best interest. Plus, we strongly believe in developing long-term relationships with our clients so we emphasize keeping the same consultant and service team in place for you.

Consulting Expertise

Get the guidance of experienced actuaries with a deep understanding of the numbers. No benefit plan is too unique or complex. Whether you need a benefits partner to help improve your employee education program or analyze costs and assist with benefit changes, our experts will give you peace of mind.

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“We recently made the decision to transition our retirement plan to a 401(k) plan. We were very pleased with the outcome...I find the people at Conrad Siegel Actuaries to be knowledgeable, attentive and responsive to our needs—an awesome relationship.”

J. Paul McMillen

President of Pennsylvania Automotive Association
Client testimonial for **Conrad Siegel Actuaries**

Plans We Service

- 401(k) plans
- 403(b) plans
- 457 plans
- Employee stock ownership plans (ESOPs)
- Cross-tested/new comparability plans
- Plans with complex or special provisions
- Money purchase pension plans
- Self-directed brokerage accounts
- Transitions from defined benefit pension to defined contribution

GET STARTED

Call **Conrad Siegel Actuaries** to schedule an appointment today. We'll get to know your unique needs and start creating a solution that's custom-tailored to your business.

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