



401(k) Plans Uncovered:

A Comprehensive Analysis Of Your Retirement Program



PROCESS

We start with a short survey to identify recommendations and best practices that will address specific challenges while enhancing plan compliance and effectiveness. Then, we score your existing plan and strategy against six key dimensions universally recognized as drivers of plan success using our proprietary weighting and scoring methodology.



PRICING ANALYSIS

Next, you will receive an apples-to-apples comparison. Your assessment includes independent pricing from multiple vendors to present you with greater insight into how each provider stacks up when it comes to record keeping fees, 401(k) advisory services, and investment expenses.



PERFORMANCE

Finally, you'll gain a comprehensive due diligence report on your investment lineup, which will empower your 401(k) committee to identify areas of opportunity to improve performance, manage volatility, and reduce unnecessary management fees.

About The Siekmann Company

Established in 1981. The Siekmann Company's experienced team of professionals are dedicated to providing local and national businesses with the guidance and expertise necessary to manage corporate sponsored retirement and employee benefit programs.

Our approach is to create an investment menu that covers a wide range of risk and return objectives and offers participants the chance to diversify their portfolios to achieve their goals. The Siekmann Company focuses on cost-efficiency, solid performance, and a versatile investment strategy. We include exposure to different geographic areas and incorporate both passive and active investment options when due diligence metrics support their inclusion in the menu.



Aaron Siekmann, CRPS® AIF®
President
aaron@siekmannco.com
614.873.5200



Jack Eddingfield
Retirement Plan Advisor
jack@siekmannco.com
614.873.5200 ext 9