

# GREMLER FINANCIAL GROUP RETIREMENT SERVICES DIVISION

*As a business owner, you offer a retirement program to attract, retain and reward valued and talented employees.  
And most importantly, to help them successfully prepare for retirement...*

The Gremler Financial Group Retirement Services Division brings over fifty years of combined retirement plan experience to all facets of retirement programs. We pursue a strategic approach to program design, employee education, investment analysis, plan monitoring, communication and ongoing support. Our expertise spans almost any plan type or combination of plan types.

EMPLOYER-SPONSORED PLANS			
Small-Mid Size Plans	Profit or Non-Profit	Bundled or Unbundled	Registered or Unregistered

PLAN TYPES			
Defined Contribution	Defined Benefit	ESOP	Nonqualified

The goal of our Retirement Services Division is to make your job easy, meet your objectives and to ensure your plan is a success. We can utilize a number of tools and deliver an array of support services to accomplish this.

Plan Sponsor Assessment	Investment Policy Statement	Ongoing Plan Review
Participant Assessment	Employee Education Statement	Replacement Ratio Analysis
RFP / Benchmarking	Initial and Ongoing Communication	Investment Due Diligence
Total Plan Design Review	Fiduciary Consultation	Plan Testing Analysis

## OUR PROCESS

- We consult with you to understand your plan goals and perform a detailed plan check-up to uncover potential areas for improvement.
- We assist in the evaluation of product provider proposals and make recommendations based on your specific objectives.
- If a change in service provider is desired, we work side-by-side with you, your current service provider and your new provider to ensure a smooth transition.
- We'll conduct initial and ongoing employee education meetings to ensure all of your employees understand the plan and the choices available to them. Our goal is to maximize participation and other aspects that result in a successful plan.
- We stay actively involved in the ongoing servicing, support and communication needs of your plan.