BROKERS-CONSULTANTS IN
EMPLOYEE BENEFITS, FINANCIAL SERVICES & INSURANCE

Group Retirement Plans

We provide the comprehensive support that addresses Retirement Plan issues and other critical concerns for group plans. You will receive local, personalized, cost-sensitive attention that assists you in design, implementation and management of your plan.

What do we provide?

Whether you currently have a retirement plan in place or are thinking about starting one, we will objectively evaluate the many plan products available in the market place and find the best one that fits the needs and objectives of you and your employees, assist you in meeting your 404(c) fiduciary responsibilities, and provide ongoing world class service.

- **Ongoing communications**
- **Enrollment Meetings**
- **Group Education Meetings**
- **Brown Bag Lunches -** Because it is sometimes logistically difficult to get a group together, you may prefer that we provide brown bag lunch meetings for your employees.

  We typically use lunch meetings to:

  - Give **market updates**
  - **Educate employees** on subjects such as, Asset Allocation, Risk Management, Dollar-Cost-Averaging, Market Volatility and many more
  - **Communicate** plan/investment changes and updates

- **One-on-One Planning / Education Sessions**
  - A day(s) scheduled onsite to meet with employees and go over individual questions, concerns and **strategic retirement planning**.
  - Or as always, we offer **one on one meetings** at Albers & Company, Inc. anytime an employee (and spouse) would like to meet with one of our consultants individually.

- **Annual Plan Reviews**
- **Retirement Transition Planning**
  - Whether an individual or a couple, making the **transition from employment** to **retirement** can be a very challenging time. In addition to the lifestyle changes faced, there are **many financial decisions** that need to be made. We believe that the best way to navigate through the financial issues is to develop a comprehensive strategy for the transition period and at the same time develop a **longer term financial strategy** for this next phase of your lives.

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