Retirement Plan Services for Businesses

Delivering Clarity and Confidence in a Complex Financial World ™

Through our registered investment advisor (RIA) firm Vantage Financial Group, Inc., a member of Retirement Plan Advisory Group (RPAG), we provide a range of custom retirement plan solutions including design, plan benchmarking, ERISA §3(21) and §3(38) investment advice, investment policy statements, guidance for fiduciary compliance and employee education. We can help your business or non-profit to successfully establish and maintain a variety of types of employer-sponsored retirement plans:

- **Traditional 401(k) Plans**
- **Safe-Harbor 401(k) Plans**
- **New-Comparability Plans**
- **Cash-Balance Plans**
- **403(b) Plans**
- **Profit-Sharing Plans**
- **SEP and SIMPLE-IRA Plans**
- **Executive Deferred-Compensation Plans**

Plan Design

Consistency with company philosophy

Plan Benchmarking

Relationship of fees, services and investments

Investment Advice

Selection of skilled investment managers

Fiduciary Guidance

Confidence in regulatory compliance

Employee Education

Helping participants pursue retirement income goals

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