TRUSTPOINT

www.trustpointinc.com

Retirement Plan Services

Trust Point collaborates with business owners to offer unique, personalized solutions for their retirement plans. Everything you search for in a 401(k) plan, Trust Point can deliver an all inclusive solution. All the details of your plan, including compliance, investment management, recordkeeping, education, and consultation, are taken care of so you can focus on the big picture.

Experience with 401(k) Plans

- Plan Design
- Recordkeeping & Administration
- Comprehensive compliance testing and IRS Form 5500 preparation
- Monitoring and implementation of legal and legislative changes
- Highest level of trustee responsibility

Exceptional Service

- Deeply committed to exceeding your expectations
- Ongoing & proactive communication in a format that works best for you (virtual or in-person)
- Nothing less than an objective, ethical, and transparent relationship
- Advisory & planning, including Investment Policy Statement consultation

Fee Transparency

- 100% transparent fee schedule structure that is simple and easy to understand
- Comprehensive services are all included in your fee
- Tier-structured fee schedule that decreases as the balance increases

Education

- Complimentary group and individual participant education
- New enrollee online training videos
- Simplified enrollment materials for participants
- Secure participant and plan sponsor account access
- Online financial resource center

Investment Expertise

- Trust Point's independent status means unbiased investment selection with no conflicts of interest
- Unique blend of investment options, which include, Socially Responsible Investing and Environmental, Social and Corporate Governance
- Clear investment philosophy and proven principles
- In-house team of professionals continuously monitoring and researching investment options

About Trust Point

For more than a century, Trust Point has provided a full range of financial and advisory services to individuals, families, businesses and charitable organizations.

Our philosophy is simple. We believe that in doing what is best for our clients, we will be doing what is best for Trust Point.

Trust & Estate Administration

Investments & Wealth Management

401(k)
Retirement Plans

Foundations & Non-Profits

Family Office

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