

Retirement Services

Design a retirement program to give your employees a solid financial future.

401(k) plans are a critical part of your benefits program. At ABD, we provide a thoughtful, results-driven approach to designing and managing plans that provide participants with confidence about their financial future. Our combination of research, education, and attentive service lets your employees evaluate the risks and choose their rewards – all with preferred pricing and products from top providers in the industry.

FEATURED SERVICES

Fiduciary Investment Due Diligence Support

Retirement Plan Corporate Governance

Investment Policy Statement

Comprehensive Vendor Marketings

Fee Benchmarking & Fee Negotiations

Plan Design Benchmarking

Vendor Management

Participant Education & Communication

Securities and Advisory Services offered through ABD Retirement Services, Inc., member FINRA and a Registered Investment Adviser.

1.866.266.5223 | theabdteam.com

WE'LL PARTNER WITH YOU TO:

Track and compare plans

We offer comprehensive benchmarking and analysis on a variety of metrics, all focused on participant outcomes. We'll also evaluate and advise on your plan design, investment structure, education, and costs. Our commitment: To make sure your employees get the most from their nest egg.

Build portfolios for better results

We aim to learn what matters to your employees and understand their financial goals. During the plan design process, our team looks at a myriad of products to find those that align with your needs. We continually challenge ourselves to identify new ideas and unique solutions that are tailored to you.

Keep employees informed

Once your plan is in place, our team will provide advice and guidance for employees with every level of investment expertise. From one-on-one meetings and benefits fairs to topic-based workshops, we'll share the answers and insights your employees need to make confident choices.

Advocate for your best interests

We can help you make sense of complicated fee structures. We'll leverage our relationships to keep plan costs competitive, and maintain the best possible pricing as plan dynamics change. As the co-fiduciary on your account, we'll also manage your compliance and regulatory responsibilities.

WHY ABD?

We are the risk and reward advisors. Our team helps you understand the relationship between risks and rewards, striking the right balance to achieve your business goals. Our experts partner with you to develop strategies and tactics that fit your unique culture. We take care of the details so you can focus on building success.

let's talk
next steps

 Insurance &
Financial Services