

retirement plan investment advisory services for tribes

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Good fiduciary practice benefits both employees and plan fiduciaries. Whether they manage a defined benefit plan, 401(k), 403(b) or another type of employee benefit plan, tribal fiduciaries—whether members of tribal councils or retirement plan committees—who follow sound fiscal management are acting as responsible stewards for the funds of plan participants. At REDW Stanley, our investment advisory practice works with plan fiduciaries who want to ensure they have the best service alternatives and investment vehicles for their plan(s).

We adhere to the highest fiduciary standards promulgated by the Center for Fiduciary Studies, the standards-setting body for fiduciary excellence. Our team of experienced and skilled retirement plan professionals offers three distinct advantages when working with you: our exclusive investment process using investment vehicles best suited to your particular plan; our transparent and fee-only structure; and our fiduciary education modules or individualized education programs.

HOW WE CAN HELP

- Participant risk-profile analysis
- Managed model strategies
- High-quality/low-cost mutual fund offerings
- Preparation of 404(c) notices
- Individualized participant advice
- Retirement readiness planning
- Investment policy statement
- Customized educational modules delivered by various methods
- Fund performance analysis and monitoring
- Retirement committee fiduciary training
- RFP analysis and consulting services when REDW Stanley is not a provider
- Plan cost and fee analysis.

In addition, REDW Stanley will act as either an ERISA 3(21) or 3(38) advisor depending on the needs of the organization. Minimum fees may apply.