YOUR RETIREMENT PLAN PARTNER

When you come to us, we do not start with a preconceived notion of the right solutions. Instead, we work with you to develop a customized approach to meet the needs of your retirement program and your organization. We look at where you are now, as well as your long-term goals. We take the time to examine how your retirement programs complement your business strategies and impact employees.

Through our financial services subsidiary (USI Securities, Inc.), we will work with you, in a partnership, every step of the way. We will analyze your needs and goals to develop tailored alternatives, explain them in language that is easy to understand and commit the time and resources necessary to marshal you through the implementation process as quickly and painlessly as possible.

OUR SERVICES

We have an extensive knowledge of the marketplace products and services, along with a strong understanding of various service providers’ strengths and weaknesses. We use this knowledge to form partnership alliances that customize services for emerging plans to ensure you get “best of breed” solutions at reasonable fee levels that are competitive in the marketplace.

The Emerging Plan Service Model was designed specifically for the purposes of serving the needs of retirement plans and provides a specialized level of assistance by packaging the following service components:

- A due diligence process that identifies the plan sponsor’s needs and goals.
- An evaluation process that matches the plan sponsor with our partnership alliances’ customized platform solutions for Emerging Plans.
- Coordination of finalist presentations to ensure that the sponsor has access to the “best of breed” solutions.
- A delivery of on-going education and current information critical to plan sponsors’ fiduciary responsibilities through publications such as:
  - “Benefits in Focus,” distributed by USI Consulting Group’s Regulatory & Compliance Department, which is designed to highlight various retirement and employee benefit matters of general interest.
  - “Monthly Market Updates,” issued by USI Advisors, Inc., which are designed to highlight various market and economic information that plan sponsors should take into consideration.
  - “Market Alerts,” also prepared by USI Advisors, Inc., are issued when market events occur that call for special attention or require additional explanation.
  - “USICG Monitor,” issued by USI Consulting Group, a compilation of articles related to the retirement industry.
- Notifications of Important Regulatory Disclosures (e.g., Annual Disclosure Notices, 408(b)-2 Disclosure Notice, Books & Records Disclosure Notice, etc.)

ABOUT USI CONSULTING GROUP

USI Consulting Group is one of the nation’s largest retirement consulting firms servicing the small to mid-sized market. It is a wholly-owned subsidiary of USI, Inc., the third largest privately-held insurance broker in the United States.

For more than 40 years, organizations have relied on us to help their employees successfully plan and invest for retirement. Our clients consist of public and private sector employers, not-for-profit organizations, as well as Fortune 500 companies.

1 Business Insurance Largest Privately Owned Brokers, January 08, 2018.