MIDWEST FINANCIAL PARTNERS

Retirement Plans

Assistance in setting up retirement plans that provide the right financial fit for your business and employees

Our financial professionals are positioned to understand and address the needs of both plan sponsors and plan participants in the retirement plans marketplace. We apply our extensive experience to assist with the transition and efficient ongoing operation of your qualified plan.

What Clients Can Expect From Us

You can expect us to give you the tools to make one of the most important financial decisions for your company—choosing a retirement plan for your company and employees. You will get an objective evaluation of the marketplace so that you can easily compare the offerings of the top providers. Our commitment is to provide you with personal attention and superior service not only throughout the process of setting up your plan but also in the ongoing operation of your qualified plan.

Services & Benefits

We help you implement a qualified plan that becomes a key element of a strong compensation and benefits package to attract and retain quality employees. We advise you about all aspects of the plan design and evaluate a wide range of plan types including:

- Defined benefit plans (based on compensation, years of service, and age)
- Defined contribution plans (including profit-sharing plans like 401(k) plans or stock bonus plans, ESOPs, and money-purchase pension plans)
- Hybrid plans (including target benefit plans that start out as a defined benefit then convert to a defined contribution plan)

Benefits we offer the plan sponsor (employer) include:

- Objective evaluation of the retirement plan marketplace and providers
- Financial professionals who educate and assist you in understanding 404c requirements
- Assistance to the fiduciary in 404c compliance issues (investment policy development and maintenance, employee education, investment reviews, and plan fee reviews)
- The flexibility to work with most third party and bundled administrators
- The ability to transition the administrator or money manager for the plan as needs change
- An annual plan review that is performed by our financial professionals and the plan trustees to examine all facets of the plan operations

Benefits we offer plan participants (employees) include:

- One-on-one enrollments with financial professionals to assist participants in understanding their risk profile and the appropriate investment strategy to meet their objectives
- Financial resources—everything from basic retirement income projections to complex estate-planning techniques
- Ongoing group workshops to educate employees onsite (frequency of workshops determined by plan sponsor)
- Ongoing access to financial professionals—personal meetings to review accounts, provide planning assistance, and answer questions
- An 800 # and web access to increase participant satisfaction and success in addressing their retirement goals

You can count on us to:

- Maintain a high degree of collaboration and communication
- Respond quickly to your requests
- Create significant value for your organization—through an attractive retirement plan that gives you a competitive edge in recruiting talented employees
- Respect your privacy. Above all, we value your trust and keep all information that we collect strictly confidential.

Value Added Advantages

We possess working knowledge of the "back room" of many administrators and major money managers. This means we have valuable insight to effectively act as an intermediary in transition and ongoing operational issues. We also give you the advantage of working with local financial professionals who are responsive to the needs of your company and employees, and can address questions and issues quickly.

Estate & Life Planning Strategies • Employee Benefits Planning • Wealth Management & Financial Strategies

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