

Overview

One easy way to make sure that you are complying with fiduciary best practices is to obtain an independent evaluation of your plan. At Portico, our thorough diagnostic helps you answer pertinent questions in the following areas:

Plan Structure: Is my plan up to date and structured in the most advantageous fashion?

Investment Policies: Does my plan have an Investment Policy Statement and are we following it?

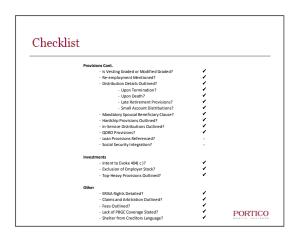
Investment Quality: Are the investments that we are providing top quality?

Fees: Do I understand all of the costs associated with my plan and am I sure they are fair and reasonable?

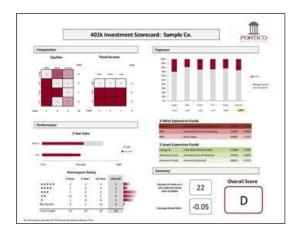
Education: Are my employees receiving world-class education, including one-on-one consultations?

Service: Does my plan offer a robust website and a designated call team for both my employees and me?

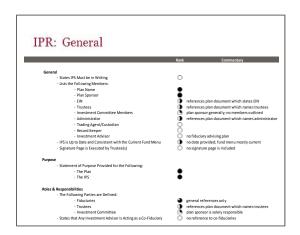
Components



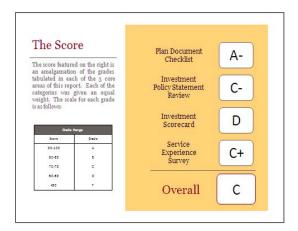
The Plan Document Checklist looks at the features of your plan versus industry standards. If something is missing, we will let you know.



The Investment Scorecard provides an in-depth review of key investment metrics, including diversification, performance, risk and fees.



The Investment Policy Statement Review highlights the areas addressed in your IPS, and offers commentary on how to make improvements.



These results, along with our Service Experience Survey, are aggregated into an overall score. This information is essential for every plan sponsor.