



RETIREMENT PLANS: With You or For You

YOUR GOALPATH TEAM CAN LEAD OR SUPPORT YOU – EITHER WAY, YOU WIN

Employers, even sponsors of smaller retirement plans, now expect their retirement plan advisor to be a specialist. And that’s challenging as it requires ERISA knowledge and expertise, knowledge of plan technologies, and the ability to deliver a high-quality user experience at scale.

GoalPath is purpose-built to support you whether you are invested as a plan expert and desire a strong team to support you or if you prefer to focus on your core competencies and refer plan opportunities to an expert partner.

Do It With Me

Best fit: The advisor who has deep retirement plan knowledge and experience and prefers to lead the client engagement

GOALPATH’S ADVANTAGE

- + We provide the tools and resources to make you look great in front of clients
- + We work largely behind the scenes supporting you
- + We help you leverage our 20+ years of retirement plan experience

ADVISOR BENEFITS

- + You present a formidable team to support any engagement
- + You can compete for larger, more complex plans



CONTINUED

Do It For Me

Best fit: The advisor whose practice is not retirement plan-centric and does not wish to build out a team or learn to be an ERISA expert

GOALPATH’S ADVANTAGE

- + We accept a client referral and provide direct-to-plan consulting
- + We provide top-tier service to your client
- + We leverage our experience, staff, and resources to deliver a great experience

ADVISOR BENEFITS

- + You can provide clients a top-tier retirement plan program
- + You have the support of a non-competitive partner who has your back
- + You can accommodate clients without distracting from your core focus



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Do It With Me

GOALPATH'S SERVICES AND ROLE INCLUDE

- + 3(38) Investment Manager
- + Ongoing Investment Selection and Monitoring
- + Quarterly Investment Reports
- + Market Commentary
- + Fiduciary Training
- + Share Class Analysis
- + Provider Benchmarking
- + In addition to the client services listed above, we help the Sanctuary advisor with record-keeper proposals and fee quotes

SANCTUARY ADVISOR'S ROLE

- + Executive Planning
- + Direct to Plan Consulting
- + Record-keeper Conversions (if necessary)
- + Service Provider Management
- + Plan Design Consulting
- + Participant Education & Financial Wellness Services
- + Participant Communication Program
- + On-site & Virtual Committee Meetings
- + On-site & Virtual Participant Meetings
- + Meeting Minutes Completion and Maintenance
- + Fiduciary Document Storage
- + Comprehensive Provider Benchmarking

Do It For Me

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- + Fiduciary Document Storage
- + Comprehensive Provider Benchmarking
- + Wealth Management Lead Generation back to the referring advisor

SANCTUARY ADVISOR'S ROLE

- + Executive Planning

Your partners at GoalPath are experts in the area of ERISA. Let us support you as part of your team or service clients via direct consulting referral. Either way you win.

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