

As a business owner, a retirement plan such as a 401k is a key benefit your business offers to help attract and retain employees. It can also allow owners to diversify significant savings to invest for their retirement.

Hi, I'm Sean Cote, director of retirement plan services with SVA Plumb Financial. SVA Plumb is partnered with businesses for over 20 years to help them with all aspects of a retirement plan including plan design, investment selection and employee education. Our team of advisors will work with your business to identify goals for your plan and then design a plan specific to those goals and resources available. SVA Plumb's investment committee acts as an investment fiduciary. We select and monitor the investments offered in your plan and implement investment changes when needed. Our education services focus on giving personal advice to your employees. We stress the importance of understanding the plan's provisions and help select an investment allocation to match their tolerance to investment volatility and their anticipated retirement age. When your company partners with SVA Plumb, you have confidence that the investment offerings are being monitored and that employees have a personal advisor to help them prepare for retirement.

Contact us to get a free assessment of your plan. The assessment will review your current plan design and benchmark fees of the investments and service providers.