



Chief Retirement Officer

Finding an organization that can deliver comprehensive qualified and nonqualified retirement and executive benefit plans has traditionally been a challenge. In fact, many companies have, out of necessity, been required to turn to as many as four different firms to obtain the professional services they need for qualified plan design, fiduciary management, investment advisory services, third-party administration and executive benefit plans. As a result, management of these plans is often confusing and fragmented, with little coordination between firms to ensure that all of the plan's elements are working to your benefit.

At Kennedy and Coe, our team is united in philosophy and strategy, providing an overall perspective that is rare in the industry. In fact, our approach puts us in the position to serve as your company's Chief Retirement Officer, coordinating all efforts to produce and maintain an effective retirement plan that works cohesively to maximize its effectiveness.

We engage in a disciplined, six-step process that includes:

- Discovery and review of needs and goals
- Design of qualified and executive benefit plans
- Implementation of retirement strategies
- Monitoring of plan assets and fiduciary practices
- Management of plan administration and compliance
- Education of plan participants

Because our team works together from the discovery stage through monitoring and education, you receive:

- A broad spectrum of compensation and retirement benefits that increases the recruiting, retention and motivation of key executives and employees
- A custom design that maximizes your unique plan goals
- Solid fiduciary management protecting officers' personal liability
- Customized investment options with service that delivers
- Plan administration that offers participants daily access to their accounts by phone or Internet
- A team that works seamlessly to provide extraordinary service and value

At Kennedy and Coe, we have the credentialed experts you need to sleep soundly. Our Accredited Investment Fiduciary Auditors, Certified Retirement Specialist Professionals, qualified Pension Administrators, Qualified 401(k) Administrators, Certified Pension Consultants, Certified Public Accountants and ERISA Attorneys work in unison, under one roof, on your benefits. That's power – the conclusive authority of a CRO working for you to provide excellence in your retirement and executive benefits.

Call 800-303-3241 for more information.