

Nollenberger Capital Partners Retirement Plan Objectives

GOALS

Nollenberger Capital Partners' goal is to assist the Plan Sponsor in creating competitive, cost-effective 401(k) plans and retirement programs while providing guidance and focus on fiduciary obligations. Our unique, personal approach involves a careful analysis of existing programs, development of goals, unbiased and expert investment assistance, guidance on fiduciary obligations and 404(c) requirements, and ongoing review and monitoring of the plan and its investments.

PHILOSOPHY

We believe that 401(k) plans and retirement programs are dynamic, evolving components of an employer's benefits offering. As such, these programs require attention and adjustments year round.

FOCUS

We work with clients whose companies are well known in their industries including: law, technology, real estate and construction, financial services, manufacturing, and professional services.

CLIENT SATISFACTION

Over the past 17 years of working with Plan Sponsors, we have found that by limiting the number of clients we serve, we can provide superior attention and time to each organization. As a result, our clients have been with us for nearly nine years on average and will willingly provide references on our behalf.

We believe that our clients choose us, and choose to stay with us, because we offer them unparalleled industry expertise, choice, flexibility and unbiased guidance.

WHAT WE OFFER

- *Unbiased Investment Guidance* — Because we are not affiliated with any fund providers or vendors, you receive unbiased investment information and choices designed to fit your company's needs. As a result, our clients often experience better investment performance against benchmarks.
- *Continuity* — As your plan evolves, we work with you to incorporate new solutions, strategies, and investments that will meet your ongoing requirements. As your 401(k) and corporate retirement plan advisor, we seamlessly integrate all of the components of your plan, assist in recommending and executing changes, and help you streamline many of the monotonous daily tasks associated with dynamic plans.
- *Attention* — We focus on assisting you in meeting your fiduciary obligations, while serving as the primary contact for your 401(k) and corporate retirement plans. We are in contact with you throughout the year and regularly review investment and plan performance.
- *Cost Effectiveness* — Our services may reduce or eliminate the need for additional outside assistance from accountants and attorneys. In many cases, plan fees may cover all or part of our fees.
- *Expertise* — With over 24 years of experience in the financial service industry and over 17 years working exclusively on implementing and managing corporate 401(k) programs, Nollenberger Capital Partners can provide you with the knowledge and tools required to make informed decisions.

