



THE POWER OF PARTNERSHIP

HUMAN CAPITAL MANAGEMENT AND 401(K) ADVISOR COLLABORATION

Collaboration by putting people first. When isolved and RSG Advisory join forces, businesses benefit. A collaborative approach helps isolved clients with streamlined and practical support on their journey to achieve their financial goals.

Combining isolved's employee benefits expertise and our retirement plan investment fiduciary management and consultative support creates a robust client solution.

WHAT WE BRING TO THE TABLE

As dedicated retirement plan specialists, we assist business owners and their employees in optimizing their company retirement plans for enhanced retirement savings at set up and provide ongoing support.

We provide in-depth knowledge, sparing clients the need to navigate SECURE Act legislation or take on unnecessary fiduciary responsibilities. Whether it's understanding state requirements, receiving education on rollovers, goal setting and monitoring, or discussing financial wellness resources, we've got your clients covered.

- 401(k) Plan design educational support
- Understanding state requirements
- Rollover education
- Roth vs pre-tax contributions
- Education for tax maximization strategies
- 401(k) investment allocation support
- Employee education resources
- Market guidance

A WIN-WIN-WIN SCENARIO

- ▶ **Together, we have already expanded isolved's service offerings.** Over **55%** of current isolved 401(k) plans are serviced by RSG Advisory as the acting fiduciary.
- ▶ **Industry recognition as experienced advisors that build a savings culture.** When all workers are prepared for financial security in retirement, we've made real progress in closing the coverage gap. And that means everyone wins.



YOUR DEDICATED TEAM:

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