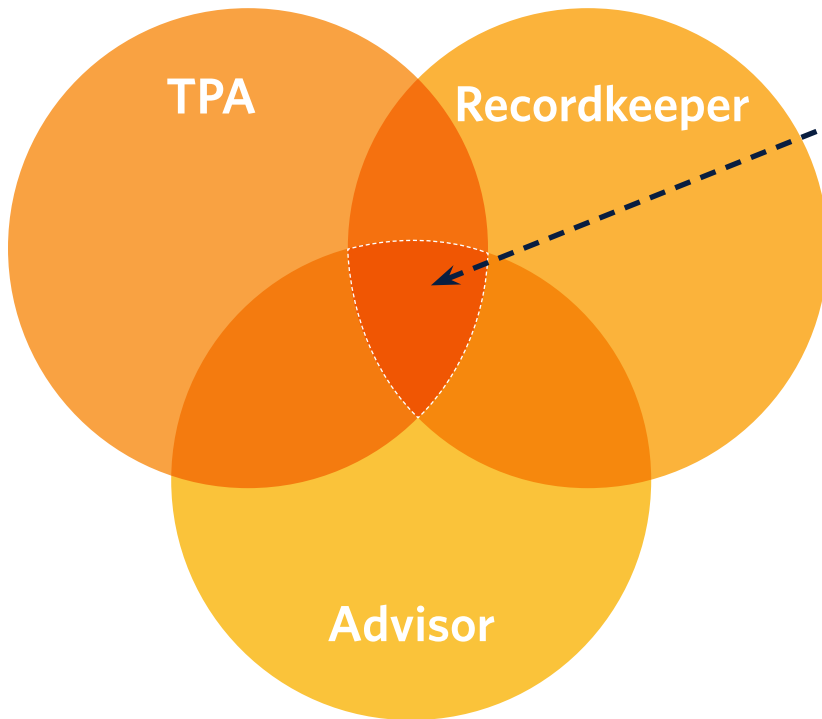


# THE TEAM BEHIND **SMART** RETIREMENT PLANS

A **successful retirement plan** works best when real people are looking after it—not just systems and checklists. Behind every strong plan is a team that understands your business, your employees, and the responsibility you carry as a fiduciary. When those partners are aligned, a plan becomes more than a benefit—it becomes a source of confidence for everyone involved.



**A well-run, compliant retirement plan.**

- ☑ The **Third-Party Administrator (TPA)** oversees plan design, testing, and regulatory compliance so the plan operates efficiently and stays ahead of changing rules.
- ☑ The **Recordkeeper** delivers secure technology, accurate reporting, and an intuitive participant experience that encourages engagement and confidence.
- ☑ The **Advisor** acts as the plan's advocate - shaping strategy, monitoring investments, educating participants, and helping fiduciaries make informed decisions.

Each role is distinct. Together, they create a retirement plan that is compliant, well-run, and built to serve the company and the people they care about.

## Callahan Financial Management Group, LLC

### Areas of Focus:

- Reduce fiduciary uncertainty
- Investment selection and monitoring
- Participant education and engagement
- Vendor oversight and service management
- Plan committee support

*A well-run compliant Retirement Plan does not run on autopilot. It runs on the right team, guided by the right leadership.*



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