PRECISION
FIDUCIARY PARTNERS
A Mesirow Company

The new retirement plan advisor

Build your dream team

Precision Fiduciary Partners helps you operate more efficiently and effectively as a retirement plan advisor—so you can focus your time on:

- Managing the plan sponsor relationship
- Consulting on plan design
- Providing participant education
- Leveraging resources to provide expertise
- Helping to manage fees

The most important driver of future growth will be your relationships

As the retirement environment changes due to a shifting regulatory landscape and fluctuating markets, the investment fiduciary role becomes more complex. Precision Fiduciary Partners can help you:

- Determine the investment lineup for your plan sponsor clients
- Reduce risk through rigorous investment oversight
- Lower costs

ADVISOR VALUE-ADDED SERVICES

Guide clients through regulatory upheaval and unforeseen changes in the industry: You will help relay regulatory changes in the industry

Deliver education to groups and one-on-one sessions: You will host virtual or in-person meetings

Oversee disclosure and compliance regulation requirements: You will help plan sponsors ensure services and fees are reasonable, recordkeeper platform is suitable, etc.

Coordinate with service providers and subject matter experts to help plan sponsors and committees fulfill their fiduciary obligations:
You will help select or oversee Third Party Administrator, recordkeeper, investment manager, etc.

Design financial wellness systems for plan outcomes: You will help with plan design by making suggestions such as auto enrollment features, plan distributions, recordkeeper platform, etc.

Contact us

To learn more, visit precisionfiduciary.mesirow.com or contact us at 512.879.1505 or pfpsales@mesirow.com.

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