



## LEADING THE WAY TO FINANCIAL FREEDOM

## EMPLOYEE BENEFITS

### Employee Benefits

Are your employees on track to replace 70% or more of their pre-retirement income? Probably not. Let our team at Alpha Financial Partners help you develop or re-design a plan to help your participants get there.

As one of the largest qualified plan consulting practices in the Bluegrass in partnership with some of the largest recordkeepers in the country, we are 100% confident in our ability to help provide the absolute best retirement plan offering for your employees. To us, this isn't just about providing low-cost, consistent performing investment options or state-of-the-art technology. Alpha is at the fore-front of one of the most important movements in employee benefits: Financial Wellness. Financial Wellness means many things above and beyond contribution rates and income replacement ratios. Becoming financially fit, or realizing financial freedom, doesn't happen overnight and entails much more than just looking at one's retirement account. Our team works with your HR and Management Team to understand your plan demographics and corporate culture to create a customized workshop for your employees. Most programs start with simple budgeting and debt management and expand into more complex topics such as estate planning and social security optimization. All of these topics combine to help create a holistic approach to put your employees on track to "Retirement Readiness".

By improving plan design, offering prudent investment options, reducing financial stress, increasing employee productivity and improving the wellbeing of both the employer and employees, Alpha Financial Partners is the trusted employee benefits partner you've been looking for. Together we will get your employees on track to "retirement readiness" while minimizing fiduciary liability and the administrative burdens that can come with this important benefit offering.

#### *Our Services*

- ERISA 3(38) and 3(21) Investment fiduciary Services
- Defined Contribution Plans (401k, 403b, 457f, 401a)
- Defined Benefits and Cash Balance Plans
- Non-Qualified Deferred Compensation Plans (409A)
- Health Savings Accounts
- Group College 529 Savings Plans
- Executive Benefits
- Employee Stock Ownership Plans (ESOP)
- Financial Wellness Programs
- Fee Benchmarking
- Plan Design Consultation
- Investment Policy Design
- Provider Search and RFP Management
- QDIA Reviews

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