



Five ways we can help

Why SHRM 401(k) Solutions by Raymond James may be the right fit for your organization

Our mission is to help your employees make meaningful progress toward their financial goals, all while saving you and your organization time and improving your fiduciary protection. Here is how we can support your organization's long-term goals.

1: YOU CAN OUTSOURCE FIDUCIARY LIABILITY TO PRUDENT EXPERTS

Under ERISA, the Employee Retirement Income Security Act, a fiduciary's duty is the "highest known to law," a responsibility that exposes fiduciaries to lawsuits and fines. The experienced, prudent and capable fiduciaries with Raymond James can help offset some of that risk for you.

2: YOU'LL HAVE MORE TIME TO PLAY TO YOUR STRENGTHS

Through SHRM 401(k) Solutions by Raymond James, Raymond James can be an efficient extension of your team, adding competencies with competitive costs, and giving you back the time to focus on what you do best.

SHRM

401(k) SOLUTIONS

BY RAYMOND JAMES

Access helpful tools,
demonstrations and information

Schedule a consultation
with a benefits consultant



3: YOU CAN ENHANCE YOUR COST STRUCTURE AND GET MORE FROM PROVIDERS

Raymond James is committed to 100% cost transparency – and as an SHRM member, you have access to a complementary benchmarking tool to compare your pricing to alternatives. As a large financial services firm, Raymond James offers its clients competitively priced investments and negotiating power with providers. As a result, clients are often able to use our scale to meaningfully reduce expenses that you and your employees pay to operate your plan.

4: YOU CAN HELP IMPROVE YOUR EMPLOYEES' FINANCIAL HEALTH

Your employees' lives, needs and levels of financial experience are unique, meaning cookie-cutter options are probably best left on the shelf. By working with Raymond James, your employees will benefit from programs and guidance informed by 60 years of wealth management experience from a firm that puts people first.

5: WITHOUT A PLAN, YOU'LL STRUGGLE TO ATTRACT TOP TALENT

Whether you do not currently offer a plan to your employees or haven't reviewed your plan for some time, potential state mandates, a competitive hiring market and a challenging environment for employee retention are good reasons to consider enhancing your organization's offerings. If you're interested in prioritizing the financial future of your employees, we can help. Schedule a consultation today!

FIND OUT HOW THE RIGHT 401(K) PARTNER CAN SUPPORT YOU AND YOUR EMPLOYEES.

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