

G-MAP | GOVERNANCE-MODEL ADMINISTRATIVE PROCEDURES

Say hello to G-MAP: a web-based, up-to-date, comprehensive governance solution for retirement plans and the advisors who serve them.

The world of retirement plan regulation is constantly shifting for plan sponsors, advisors, and their supervising firms. Increased regulatory scrutiny from the Labor Department, as well as litigation against plan sponsors, has placed a spotlight on plan operations, procedures, and documentation.

G-MAP, an online tool available to subscribing firms and advisors via PRI's Advisor Resource Center web portal, provides advisors with a 10-step roadmap to better navigate a world of increased scrutiny and enhances their service offering to plan clients.

At its core, G-MAP—short for Governance-Model Administrative Procedures—covers four modules:

- Service Providers
- Plan Administration and Reporting
- Investments
- Plan Governance and Documentation

Each of the modules comes with educational slideshows and video presentations, which advisors can present to plan sponsor clients. Advisors also have access to off-the-shelf guides for plan sponsors that provide information on the nuances of employers' fiduciary responsibilities with respect to service providers, investments, and plan administration and reporting.

Advisor guides and client-facing supplemental material, such as a sample committee charter and 408(b)(2) worksheets, are among the tools available via G-MAP. PRI staff, including ERISA attorneys and former regulators, maintain these resources to ensure you and your clients are always ahead of the curve.

In an era of heightened regulatory scrutiny, plan sponsors will need a tactical approach toward managing their retirement plans. Advisors using G-MAP can be their quarterbacks.

SERVICE PROVIDERS



INVESTMENTS



PLAN ADMINISTRATION & REPORTING



PLAN GOVERNANCE & DOCUMENTATION



About the PENSION RESOURCE INSTITUTE

Integrating securities and ERISA expertise, PRI delivers competitive and compliant solutions to financial institutions serving the needs of retirement investors. Advisor training and tools are provided through our Advisor Resource Center.



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