

## Get Ready: Your retirement business is about to undergo a seismic shift.

Regulatory scrutiny, litigation and competitive pressures are leading retirement-focused advisors to expand the nature and scope of their plan-level services with a focus on plan governance and compliance. The Department of Labor (DOL) Fiduciary Rule will raise the bar at individual-level as well as subjecting a broader array of activities to a heightened standard of care, including recommendations for IRA rollovers and advice to IRA owners generally.

### RetirementAdvantage

Access PRI's library of turnkey compliance documents, including model agreements, disclosures, policies and procedures for serving retirement investors, including ERISA and non-ERISA plans, plan participants, IRAs and IRA rollovers, in a competitive and compliant manner. PRI and its team of ERISA lawyers and compliance professionals maintain an array of templates that can be configured to support varying levels of brokerage and advisory services based upon the expertise of the advisor and supervisory capabilities of the financial institution.

*RetirementAdvantage* is PRI's most comprehensive offering and includes access to the Advisor Resource Center and G-MAP. [Click to learn about RetirementAdvantage for BD/RIAs.](#)

### Advisor Resource Center

The Advisor Resource Center (ARC) is a one-stop source for the most recent retirement industry information, including fiduciary training and tools to help advisors differentiate and scale their practices. ARC can be customized to deliver firm-specific training and product-related information.

### G-MAP

PRI's proprietary resources provide advisors with an arsenal of tools for prospecting and strengthening relationships with retirement plan clients. G-MAP, short for Governance-Model Administrative Procedures, empowers advisors to cover one of the hottest issues facing retirement plans today: effective plan governance.

The centerpiece of G-MAP is a 10-step web-based roadmap that covers three modules central to plan operation: service providers, investments, and plan administration. A fourth module on plan governance and documentation addresses topics such as effective committee structures, consistent and repeatable decision-making, and document retention.

Each module contains a collection of standalone, client-facing resources, including educational literature, worksheets, and instructional videos. These materials, which are designed to manage risk and save advisors—and their clients—valuable time, will help supervising firms ensure advisors are delivering on their commitments to ERISA plan clients. [Click to learn more about G-MAP.](#)

*For more information, please contact PRI at [info@pension-resources.com](mailto:info@pension-resources.com) or call 913.236.9841.*

### 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.*

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