

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

Regulatory scrutiny and litigation are leading retirement focused advisors to expand the scope of their current services to deliver more holistic solutions to plan sponsors with a focus on plan governance. The Department of Labor (DOL) Fiduciary Rule will raise the bar even higher as more services will be considered fiduciary in nature, including recommendations for IRA rollovers and advice to IRAs generally.

RetirementAdvantage

Access PRI's library of turn-key compliance documents, including model agreements, disclosures, policies and procedures for delivering competitive and compliant plan- and participant-level advisory services, IRAs and IRA rollovers. PRI and its team of ERISA lawyers and compliance professionals develop and maintain the templates that specify the services that advisors are permitted to provide to retirement plans, simplifying compliance with SEC, FINRA, and Labor Department regulations.

RetirementAdvantage is PRI's most comprehensive offering, as it includes access to the Advisor Resource Center and G-MAP.

[Click here](#) to learn more about *RetirementAdvantage*.

Advisor Resource Center

The Advisor Resource Center (ARC) is your one-stop source for new retirement-related information, including client-facing fiduciary training and tools to help you differentiate and scale your practice. ARC is constantly updated to deliver a library of practice management materials for advisors, regardless of where you are in the life cycle of building your business.

G-MAP

PRI's proprietary resources provide you with an arsenal of tools for prospecting and strengthening your relationships with existing clients.

G-MAP, short for Governance-Model Administrative Procedures, empowers advisors to cover one of the hottest issues facing retirement plans today: effective and scalable 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 you - and your clients - value time, will help you deliver actionable education to plan sponsors.

[Click here](#) to learn more about *G-MAP*.

Please email info@pension-resources.com for more information or call 913-236-9841 to schedule a demo.

ABOUT THE PENSION RESOURCE INSTITUTE

Integrating securities and ERISA compliance, PRI works with broker-dealers and investment advisors to develop and maintain competitive and compliant retirement plan services.

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