



A GUIDE TO OUR SERVICES

Working closely with our clients is our top priority.



SERVICES OVERVIEW

Being a Plan Sponsor

As the sponsor of an ERISA-qualified retirement plan, you have given your employees a tremendous opportunity to invest in their future. Of course, it's a benefit that comes with significant responsibility, one that requires a lot of attention and oversight, and can quickly drain valuable time and resources. At Touchstone Retirement Group (TRG), we are experts at managing retirement plans and do so through a variety of services. Every day, we work on behalf of our clients with one goal in mind: How can we help the most?

Our Services



Fiduciary Liability Mitigation

Being the primary fiduciary for a retirement plan is no small commitment, and fiduciary liability can feel overwhelming if it's not your primary acumen. Your employees may not understand the level of effort and trust involved in their plan, but we do. When we take on the role of primary fiduciary for your organization, you transfer that trust to us, and we take it very seriously.



Administrative & Operational Sourcing

Managing an ERISA-qualified retirement plan involves a level of compliance that can be tricky and time-consuming. It's likely one of a slew of responsibilities competing for your attention on a daily basis. It's easy to see how so many organizations look to outsource the effort either partially or completely. The team at TRG is experienced in working with a variety of organizations at various effort levels. In other words, TRG will manage as much, or as little, of your plan as you need so that you can focus on growing your business.



Retirement Outcome Realized

Retirement plans are not a one-size-fits-all benefit. Beneath all the numbers, models and forecasts are participants, people who are valuable to your organization. With this in mind, TRG works diligently to create a participant experience that will produce meaningful retirement outcomes. And it all starts with a personal understanding of your business and the individuals who make up your team today, tomorrow and 20 years from now.

Who We Are

At TRG, we hold ourselves to a high standard of stewardship. We start and end every day with an understanding that our job is to grow futures and to develop relationships with our clients so that we can understand what those futures look like. Our tools are efficiency, knowledge, judgment and understanding.

Look at us alongside our competitors, and you'll see a team that looks more distilled and focused. We aren't a huge team, we are a broad team with a depth of experience and creativity that you won't find anywhere else. We are independent and impartial, and we are dedicated to our clients. Our business is ensuring your future, and it all starts with a simple question: How can we help you?

What Our Clients Say



TRG has supported the Hanes Supply, Inc. 401K plan for the last seven years. The service provided by TRG is world-class. When it comes to the administration, recordkeeping for the plan and their year-end compliance, TRG's annual plan audit always runs smoothly. They are always there to answer any question that an associate may have, and their website is very informative and easy to use. Hanes Supply looks forward to working with TRG in the future.

Keith Anterline
Hanes Supply, Inc.



TRG has been a partner for our executive leadership team, making the process of switching, merging and eventually managing our 401K seamless and easy. Service to our team has been off the charts. Partnership and support has been unparalleled. Thank you, all!

Mitchell Reiner, CFP®, CIMA®
Capital Investment Advisors



TRG has made the hopes of expanding our 401K practice a dream come true. Their thorough, organized and hands-on approach to doing business together has been nothing short of amazing. They are an integral part of our team, and we could not ask for a better organization to interact with our clients every day!

Dominick Tavella
Diversified Private Wealth Advisors



***You can count on TRG to help
you navigate the complexities of
sponsoring a retirement plan.***

It's what we do.

