Maximize your total benefits and compensation by aligning your retirement philosophy and plans with your organization’s goals. A partnership with the Retirement Plan Consulting team of Arthur J. Gallagher & Co. helps you manage plan selection, design and structure, regulations and filing requirements, employee education, and long-term retirement planning for employees.

Gallagher’s national Retirement Plan Consulting practice:
- Services more than 2,100 plans with*
- $44 billion in assets under care*
- 63 church-sponsored and religious organization clients representing $1.5 billion in assets under care*

*as of 12/31/2013

Gallagher’s Retirement Plan Consulting practice holds a CEFEX Certification of Investment Support Services, which is an independent recognition of conformity to a Global Standard for firms which support investment fiduciaries.

This certification from the Centre for Fiduciary Excellence, LLC (CEFEX) gives confidence to our clients that the management system supporting our Knowledge Management Platform and Fiduciary Risk Mitigation processes, conforms generally to the Standard: “Prudent Practices for Investment Support Providers.” The Standard is intended for firms which deliver stewardship in retirement plan governance.

Qualified Plan Consulting
- 401(k), 403(b), Defined Benefits, 457, Money Purchase and Cash Balance Plans
- 3(21) Investment Advisor
- Named Fiduciary
- Investment Policy Statement
- Quarterly Investment Monitoring
- Advice for Investment Selection and Replacement
- Fund Analysis
- Plan Design Consulting
- Plan Integration and Transition
- Plan Enhancement
- Compliance Management
- Fiduciary Governance Consulting
- Fiduciary Training
- Fiduciary Checklists
- Voluntary Compliance Process Management
- Conflict of Interest Audits
- Plan Committee Audits
- Year End Plan Review
- Participant Education Strategy and Management
- Fiduciary Vault Web Portal
- Whitepapers and Webinars
- Vendor Management
- Independent Provider Search and Selection
- RFI’s and RFP’s
- Fee Audits and Benchmarking
- Plan Audits and Benchmarking
- Forensic Plan Audit
- Conflict of Interest Index

Executive Benefits Consulting
- Non-qualified Plans
- Plan Design
- Cost Containment Review
- Provider Search
- Participant Services
- Funding Analysis
- Plan Integration and Transition
- Benefit Restoration
- Succession Planning
- Executive Life, Disability and Long Term Care Insurance
- COL/BOLI
- Executive Compensation Planning
- NQ Plan Benchmarking

Actuarial Consulting
- Actuarial Audit
- Plan Liability Audit
- Assumption Review
- Cash Flow Projections
- Actuarial Valuation Reporting
- Annual Government Compliance
- Benefit Calculation
- Replacement Ratio Analysis

Gallagher Benefit Services, Inc., a wholly owned subsidiary of Arthur J. Gallagher & Co., is a non-investment firm that provides employee benefit and retirement plan consulting services to employers. Securities and Investment Advisory Services may be offered through NFP Advisor Services, LLC, Member FINRA/SIPC.

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