

Educating Participants on Distribution Options

Let an Investment Professional Help You

Your retirement plan is one of the most important benefits your company provides to its employees. By incorporating the services of an experienced, impartial investment professional to assist with distribution and retirement planning, you can increase the value of your plan.

AN INVESTMENT PROFESSIONAL CAN OFFER:

- Customized seminars and tools to educate employees.
- Unbiased, professional education for employees.
- A convenient local resource available to answer employee distribution questions.
- A variety of investment solutions for employees considering rolling plan assets into a rollover IRA.
- Objective guidance to plan participants who want help evaluating their unique retirement planning needs.

There are several benefits to you and your employees:

BENEFITS TO YOUR COMPANY:

- Add value by offering employees access to an unbiased investment professional.
- Communicate more frequently and effectively with plan participants.
- Free up your time to concentrate on core business initiatives.
- Enhance employee plan satisfaction.

BENEFITS TO YOUR EMPLOYEES:

- Develop an understanding of plan distribution options and the advantages and disadvantages of each.
- Develop an understanding of the benefits of saving through retirement plans, highlighting on the advantages of tax-deferred growth.
- Obtain professional education on asset allocation and managing investments.
- Receive impartial education from a licensed investment professional.

Your RBC Wealth Management® Financial Advisor has a library of materials available designed to explain retirement plan distribution options, asset allocation, and retirement planning to your current employees, pre-retirees and employees leaving your employment.

At RBC Wealth Management, we will partner with you to help meet your employee needs. We are a full service brokerage firm founded in 1909 with offices nationwide. Our success is due to our ability to develop long-term relationships with our clients by providing an experienced, consultative wealth management approach.

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