

CRI comprehensively translates your company's retirement plan objectives into practical application.



BENEFIT FROM SERVICES AND SOLUTIONS THAT ARE:

- **Customized.** CRI strategically designs retirement plan solutions to meet your company's long-term goals – whether you are working to attract and retain key employees, addressing unique personnel circumstances, improving your plan's investment options, reducing plan expenses, gaining significant tax advantages, or identifying and satisfying fiduciary duties. We translate your objectives into practical application, and you enjoy the efficiencies and confidence gained by our experience.
- **Comprehensive.** CRI offers solutions so that your retirement plan meets your business' goals and the personal needs of plan participants. Our services cover everything from plan design and investment program selection through implementation, record keeping, and compliance.
- **Compliant.** Our specialists independently design your plan and create documents and an administration guide to assist the plan sponsor with IRS and DOL compliance. We also provide company and participant reports and regular plan review to help ensure you are taking full advantage of what the law allows.

CRI is a single solution provider that manages the design, implementation, and administration for retirement plans of all types including defined benefit, 401k, 403b, profit-sharing, and employee stock ownership plans (ESOPs).

Retirement plans are complex when considering the component parts: participants, custodians, trustees, trading platforms, compliance administration, record keeping and investments. Our team helps you navigate this complexity with a comprehensive approach.

Whether you are just starting a plan or have an existing plan, our integrated services can assist you in many ways (e.g., an assessment of optimal plan design, investment choices, etc.). We offer suggestions for reducing costs and increasing benefits by leveraging our federal regulation expertise and experience in ways that enhance benefits to both the employer and participants.