PLAN FOR SUCCESS

Delivering Positive Retirement Outcomes for Plan Participants

Millennium Advisory Services is a registered investment advisory firm and provides important fiduciary support for plan sponsors at the participant level. Millennium works with plan sponsors to provide required education and communication services and fiduciary advice that participants are increasingly looking to plan sponsors to provide. Our operational relationship with leading 403(b) custodians allows Millennium to provide financial advice and portfolio recommendations on employee investments held in 403(b) plans at those custodians.

SERVICES FOR PARTICIPANTS

- Educate plan participants about the investment options available in the retirement plan and the benefits of a better diversified investment portfolio to help employees reach their retirement goals.
- Provide periodic written communications via email and/or group presentations on campus to help employees stay informed on issues such as saving, investing and retirement.
- Meet individually with interested employees to provide guidance through a risk profile questionnaire designed to help employees make better risk-adjusted investment decisions for themselves in their retirement accounts.
- Meet privately with interested employees on campus to complete our more extensive financial planning process (spouses/significant others are also included).
- Develop a financial plan based on the employee's financial analysis and personal circumstances and goals.
- In a fiduciary capacity, provide professional fee-based management of client assets in retirement accounts.

GICA Georgia Independent College Association

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