



Episode 86: Choosing the Right Retirement Plan Advisor

In this episode of *Revamping Retirement*, CAPTRUST's [Audrey Wheat](#) and [Matt Patrick](#) sit down with Jake Connors of [Cofi](#) to discuss how independent search consultants can help plan sponsors navigate one of their most important fiduciary decisions—selecting a retirement plan advisor. The conversation explores how advisor searches have evolved beyond fees and investments to focus on service, HR support, and accountability, along with common pitfalls sponsors face when going it alone. Looking ahead, the group discusses how a maturing industry is reshaping expectations for both retirement and broader employee benefits oversight.

Get more insights for retirement plan sponsors by subscribing to [Revamping Retirement](#).

Legal Notice

This material is intended to be informational only and does not constitute legal, accounting, or tax advice. Please consult the appropriate legal, accounting, or tax advisor if you require such advice. The opinions expressed in this report are subject to change without notice. This material has been prepared or is distributed solely for informational purposes. It may not apply to all investors or all situations and is not a solicitation or an offer to buy any security or instrument or to participate in any trading strategy. The information and statistics in this report are from sources believed to be reliable but are not guaranteed by CAPTRUST Financial Advisors to be accurate or complete. All publication rights reserved. None of the material in this publication may be reproduced in any form without the express written permission of CAPTRUST: 919.870.6822.

© 2026 CAPTRUST Financial Advisors