



## 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.

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