CAPTRUST

High Impact Retirement Plan RFPs (Webinar Recording)

The discussion covered insights on recent trends in advisor searches, common pitfalls plan sponsors face, and best practices for evaluating proposals with confidence. Attendees will leave with actionable guidance to help streamline the process and select an advisor aligned with their planâ??s longâ??term goals.

For a copy of the transcript, click here.

Additional Materials:

High Impact Plan RFPs Presentation

Request for Proposal (RFP) Retirement Plan Advisor Search

Selecting and Monitoring Pension Plans: Tips for Plan Fiduciaries

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