

## The Keys to a Successful Retirement Plan for Law Firms (Webinar Recording)

For law firms looking to stand out in the battle for talent, offering the right combination of retirement benefits that meets the unique needs of both partners and staff is critical.

In this webinar recording, you'll hear from two experienced retirement plan sponsors: Jennifer Halliday, chief human resources officer from ArentFox Schiff, and Don Mazursky, ERISA attorney at Smith Gambrell Russell, about best practices and strategies for retirement plans designed specifically for the legal industry. Topics covered include:

- The importance of fiduciary training
- The differing needs of 3(38) and 3(21) plans
- Fee benchmarking and recordkeeper searches

## About CAPTRUST

As one of the largest independent providers of fiduciary investment advisory services, CAPTRUST works with more than 170 law firms around the country on defined contribution, defined benefit, cash balance, and partner equity programs. If you're ready to make your retirement plan stand out, please join us.

To download a copy of the transcript, click here.

## **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

Page 1 September 27, 2023



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.

© 2025 CAPTRUST Financial Advisors

Page 2 September 27, 2023