

TOP REASONS TO WORK WITH A 401(k) FINANCIAL PROFESSIONAL

Working with a financial professional can provide many benefits for business owners.



Expertise and Knowledge

Whether you're putting a new retirement plan in place or replacing an existing one, the process can be overwhelming. But, by working with a financial professional you can leverage their expertise and knowledge of retirement plan options, regulations, and best practices. They'll provide you support throughout the entire process from initial plan design to getting employees enrolled and everything in between.



Fiduciary Support

Financial professionals are there to provide guidance so you can make the right decisions at the right time. In turn, as a plan sponsor, you have certain fiduciary obligations to your plan participants. By assisting you in understanding and fulfilling your fiduciary duties, a financial professional can help mitigate potential legal and financial ramifications for your business and/or you personally.



Employee Education and Engagement

Want to get your employees more interested in the retirement plan? A financial professional can educate your team about the advantages of enrolling in the plan and offer ongoing assistance to ensure they're making progress toward their goals. They can also help participants determine contribution amounts and investment options based on their personal retirement aspirations and risk tolerance.



Additional Services

A 401(k) financial professional may be able to offer other benefits to the company such as group insurances (ie. disability, life, health, dental), as well as be able to offer individual solutions for both the employer and the employees. These solutions could provide strategic advice to help individuals plan for their financial future and lead to feeling support and motivated.

Retirement Services Sales Desk
(877) 401-7253
SalesDesk@mutualofomaha.com