

GENERAL FIDUCIARY DUTIES

The first step of our model is understanding the core fiduciary responsibilities. These include selection of plan fiduciaries, transparency, alignment with plan goals, lack of conflict of interest, and documented reasonable actions on a consistent basis.

PLAN DOCUMENTATION

All necessary plan, oversight, and review documents are created and updated.

INVESTMENT CHOICES

The selected investment choices will be adequate and non-complex.

REASONABLE EXPENSES

The LR model features fair and competitive fees and expenses.

PLAN EDUCATION

Clients can always expect an open line of communication to fully understand everything LRC does at every step of the way.

PLAN SIMPLICITY

A reasonable plan is created to be transparent, clear, and simple.

INVESTMENT POLICY STATEMENT

Plans will feature a sound, up-to-date investment policy statement.

INVESTMENT PERFORMANCE

Only competitive funds will be selected to establish sound investment performance.

PLAN REVIEWS

Periodic plan reviews will ensure best practices are being met, as well as to ensure plan operations match the established plan documents and Investment Policy Statement.

INFORMED PARTICIPANTS

By following this model, our goal is to ultimately ensure clients are fully informed and understand the level of commitment LRC has to being a responsible fiduciary.