

Retirement Plan Value Proposition Statement

Prepared for: Valued Client of Atlantic Financial Consulting Group

Mission Statement We will help you create and maintain a high-quality retirement plan by providing a superior level of plan service for you and ongoing educational support for your participants.

I. Overall retirement plan servicing philosophy

- a. We believe that only investments with consistent long-term results belong in your retirement plan.
- b. We believe well-educated plan participants are more likely to save at higher rates and invest for the long term.
- c. We believe you have more strategic things to do than worry about every little detail of your plan's administration.
- d. We believe that any and all fees associated with your retirement plan should be reasonable.

II. Plan sponsor support

- a. We will help you evaluate the costs of multiple provider proposals.
- b. We will show you how to create a diversified menu of investment options.
- c. We can help you review your investments quarterly.
- d. We will help you and your legal counsel understand what it means to be a plan fiduciary.

III. Commitment to participant education and ongoing service

- a. We will provide customized enrollment books and personally conduct the enrollment meeting for your new retirement plan.
- b. We will make sure your plan receives periodic retirement plan education, targeted to meet the needs of your employees.
- c. We will help to facilitate rollovers for your participants when they leave the plan.

For plan sponsors only. Please consult your tax and legal advisers regarding the consequences of establishing and maintaining an employer-sponsored retirement plan.