The TruePlan Fiduciary Advantage

TruePlan℠
Benefit and Retirement Advisors

Ongoing retirement plan committee services

Our ongoing committee services help your fiduciary team stay informed, compliant and confident. Through annual refreshers, topical deep dives and committee member certifications, we help you maintain a strong governance framework year after year.

Annual fiduciary refresher

Each year, we present reminders to your committee, including:

- review of core fiduciary duties;
- governance documents check-up;
- fiduciary best practices overview; and
- commentary on recent litigation and regulatory changes.

WHY IT MATTERS

Lawsuits often focus on process, not outcomes. Annual refreshers help keep your governance current and on point.

Topical deep dives

We provide focused sessions on emerging fiduciary topics, such as:

- updates from the IRS and DOL;
- case studies on litigation; and
- new fiduciary regulations and best practices.

WHY IT MATTERS

Staying informed helps committees evolve and make prudent decisions.

Committee member orientations

We make it easy for members to demonstrate fiduciary readiness. Orientations include:

- training on fiduciary duties and best practices;
- familiarity with committee governance procedures; and
- understanding how the retirement plan works.

We offer quick onboarding sessions for new members and document completion via email for transparency.

The TruePlan Fiduciary Advantage means ongoing confidence, compliance support and clarity for your committee.

HAVE QUESTIONS?

Reach out to TruePlan Benefit and Retirement Advisors.

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