The TruePlan Fiduciary Advantage

TruePlan℠
Benefit and Retirement Advisors

How we onboard your plan for success

Confidence. Compliance. Clarity — from day one.

A strong fiduciary process doesn't happen by accident. It starts with the right onboarding.

TruePlan Fiduciary Advantage onboarding establishes a clear, thorough foundation for plan governance from the very beginning. We work with your team to define roles, document decisions and align oversight practices, so your plan is structured to support fiduciary standards.

From governance structure and fiduciary education to repeatable processes, we help you put a prudent framework in place designed to support prudent decision-making, help reduce risk and support your organization and plan participants.

Process review and establishment

WHAT WE DO

Upon engagement, we work together to implement a structured, documented process that reflects fiduciary best practices including:

- formal meeting cadence and touchpoints;
- vendor management and oversight; and
- clear roles and responsibilities.

WHY IT MATTERS

A well-defined process is the cornerstone of fiduciary compliance and risk mitigation. Good processes create good outcomes. We help you wrap your plan in a sensible governance structure.

MORE >

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Consulting on governance documents

WHAT WE DO

We help formalize your plan's oversight and decision-making framework with support on governance documents that clarify roles and responsibilities.

We consult on:

- board resolutions recognizing plan committees;
- committee charters and bylaws; and
- Investment Policy Statement (IPS).

WHY IT MATTERS

Strong governance documents create the framework for a process, which supports prudence, clear responsibilities and helps protect fiduciaries.

Fiduciary overview and education

WHAT WE DO

We provide fiduciary training to help committee members understand their responsibilities under ERISA, including concise fiduciary training videos or sessions.

We cover:

- core fiduciary duties;
- best practices for oversight; and
- how ERISA standards apply to your plan.

WHY IT MATTERS

Fiduciaries make decisions on behalf of participants and beneficiaries. Education helps guide informed and prudent decisions.

HAVE QUESTIONS? Reach out to TruePlan Benefit and Retirement Advisors.