



BENCHMARK
PRIVATE WEALTH MANAGEMENT

Complimentary Benchmarking from Benchmark Private Wealth Management

Benchmark Private Wealth Management would like to review your company's 401(k) plan for no charge. We think this is an opportunity for Benchmark Private Wealth to help your business and its employees.

The recent Supreme Court ruling, which added protection for investors in 401(k) plans, directly affects your company. It is now crucial that plan sponsors and fiduciaries perform an independent review and analysis of your 401(k) plans.

Under the federal Employee Retirement Income Security Act, companies that sponsor 401(k) plans have a "fiduciary responsibility" to act in the best interest of their employees. Even a small difference in 401(k) investment fees can result in the difference of tens of thousands of dollars of savings.

Our complimentary review and analysis will help you document your fiduciary duty to monitor your plan. If we think your plan is solid, we will let you know. If we identify high areas of weakness or other factors such as constrained investment options or unnecessary costs, we will provide you with suggestions to improve those areas of your current plan.

Read the Supreme Court ruling of [Tibble v. Edison](#) to more fully understand the implications to your 401(k) plan.

While there is much more to discuss, we would be happy to have a call or meeting at your convenience. Reach out to us with any questions at info@benchmarkpwm.com or (214)-474-2190.

*Benchmark Private Wealth Management products are not FDIC insured, may lose value and are not bank guaranteed.

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