Risk & Insurance | Employee Benefits | Retirement & Private Wealth

Comprehensive Retirement Plan Consulting Services from Hub

Is your current retirement plan built to attract and retain great employees? At HUB, our people are committed and our services are designed to take your plan to the next level. We deliver comprehensive benefits packages that help you develop a competitive edge in the marketplace. And best of all? We'll be with you every step of the way.

Let Your HUB Advisor Do the Heavy Lifting

When you hire a HUB advisor, you are partnering with someone who understands the varied needs and challenges of employers and business owners. Many of our advisors previously owned their own firms. They chose to partner with HUB because of its large scale, back office support and technology solutions —all of which frees them up to spend more time delivering more services and value to you and your employee.

Reduce Employee Financial Stress in the Workplace

HUB FinPath is an interactive online learning center that includes the availability of individual Financial Coaches. The platform was designed to help your employees manage their finances, reduce their stress and improve their workplace productivity. HUB FinPath provides the foundational education to make the right financial decisions, plan for the future and get support when needed.

Leverage Our Size and Scale

In an environment where retirement plan industry consolidation continues at a fairly quick pace, it's important to know your partner has the size and scale to be in it for the long term. We're investing more than ever in back office support, technology solutions and new product innovation. In addition, our broad and long-standing relationships with plan recordkeepers and investment providers helps ensure your employees have access to the most appropriate services and solutions to help improve their retirement outcomes.

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HUB Retirement Plan Consulting Services at a Glance

HUB offers workplace retirement plan consulting services to the corporate, Taft-Hartley, public and non-profit sectors.

SPONSOR SERVICES

- Fiduciary Vault system
- Investment Committee formation
- Strategies for managing liability
- Meeting minutes
- Regulatory updates

INVESTMENT SERVICES

- Investment Policy Statement (IPS) review
- Performance measurement
- Asset allocation studies
- Investment reporting
- Quarterly market updates
- Sign-on as a fiduciary to the plan – 3(21) or 3(38)

VENDOR MANAGEMENT

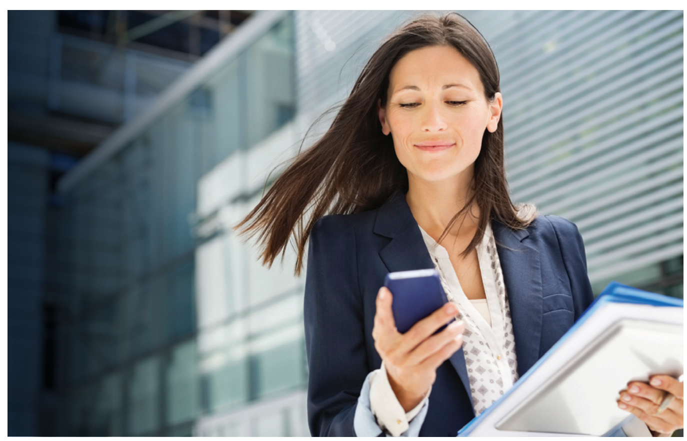
- Vendor due diligence
- Total cost analysis
- Vendor benchmarking
- RFP / Vendor searches
- Contract, fee and service regulations

PLAN DESIGN

- Document review
- Plan fiduciary review
- Plan operations review
- Compliance assistance
- ERISA section 404(c) assistance
- Plan design education
- Executive benefits analysis

PARTICIPANT SERVICES

- Employee education policy development
- Guidance surrounding available resources
- Financial wellness platform through HUB FinPath



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