



Simplify benefits and retirement administration—without breaking budgets.

Balancing competitive benefits and your mission can be tough. Add to that recruitment challenges, low benefit participation and navigating the ever-changing legislative landscape, it's OK if you're feeling overwhelmed. The good news is, we can help.

Alleviating your administrative burden.

We take on all the service, administration and compliance support that comes along with employee benefits and retirement plans so you can focus on what's most important: the people who help your organization thrive.

Employee Benefits

- Benefits Consulting & Design
- Benefits Administration
- Education, Communication & Enrollment
- Core Benefits
- HSAs, FSAs, HRAs
- Voluntary Worksite Benefits
- Other Healthcare Options

Retirement Plans

- 401(k)
- 403(b)
- 401(a)
- Consulting, Design and Administration
- Education, Communications & Enrollment
- Third-Party Administration
- Recordkeeping
- Defined Benefit Plan Actuarial Services
- Investment Advisory Services

Compliance

- Compliance Guidance Services & Support
- Plan Document Audit Support
- Affordable Care Act & Human Resources Consulting
- Leave Administration
- Dept. of Labor Notices
- 5500 Preparations & Filing, Audit Support

About Us

Simply put, we are one of the nation's largest independent, privately held firms specializing in employee benefits, retirement plans and all their associated compliance needs. Since 2008, we have grown by acquiring over 60 local and national firms that have been trusted members of their communities for decades. Independently certified as a "Best Places to Work — USA" company, we currently serve more than 18,000 employer groups and 3.6 million plan participants nationally.



Partner with People Who Know the Non-Profit Sector

A National Footprint with Over 35 Locations
and deep relationships with all the national carriers of the leading insurance products.

18,000+
Total Employer
Clients

3.6M
Plan
Participants

\$900M
Premiums

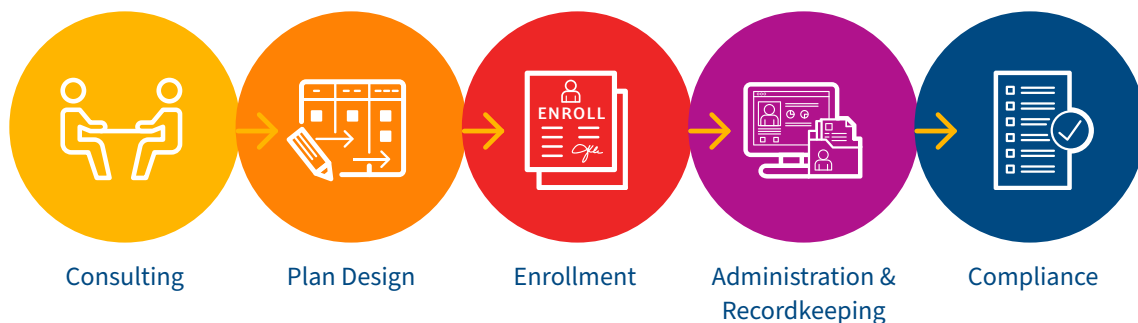
\$125B
Assets Under
Management

Used by nearly 50% of all school districts across the nation (School District Clients: 6,000+)

There is a reason for our above-industry-average client revenue retention rate. It's our passion for our clients and partners.

Our Approach

Combined with proprietary easy-to-use technology.



Our Difference

We are on a mission to make it all simpler. Helping you take care of the health and financial wellness of your #1 resource — your people — today and tomorrow.

Let's have a conversation.
It's that simple.