The Comperio**Advantage**: ADVISOR/CONSULTANT SEARCH

The Environment

Hiring a consultant to assist your Committee with managing fiduciary liability has become more complex in today's environment. Determining the appropriate service structure and identifying relevant experience dramatically increases your odds for success. How can you increase your odds of success? One way is to partner with a professional who understands the marketplace and has developed an unbiased process for selecting a consultant. Comperio Retirement Consulting works with clients on a one-time project basis to assist in the identification of potential advisor/consultants partners. Our formalized search process maximizes the likelihood of including quality firms and analyzing the firms ability to add value to your retirement program.

Selection Process

- **Selection of Consultants for RFP** – Evaluation of consultant experience and their business model. Should multi-practice and/or retirement specific firms be evaluated? Evaluation of the benefits of ERISA 3(21) or 3(38) fiduciary consulting models.
- **RFP Evaluation Process** – What specific tasks does an ERISA 3(38) fiduciary perform? Does the firm have experience with fiduciary governance, fee negotiation, investment analysis and monitoring and plan design services.
- **Documenting the Process** - Comperio provides a final written report documenting the selection process.

The Client

Global Manufacturing Firm

Retirement Plan Assets: $550 Million

Number of Active Participants: 1,000+

10 year relationship with current consultant

Consultant providing limited plan related services

Goals

- Identify an appropriate retirement plan consulting model.
- Evaluate a comprehensive list of advisor/ consultant partners.

Approach

- Qualitative and Quantitative Review of each Candidates Capabilities
- Understanding of Client Interactions
- Negotiate appropriate fees for services.

The Results

Comperio Retirement Consulting's proprietary process and analysis of the retirement plan consulting universe resulted in:

Complete Understanding of the Universe of Advisors/Consultants

Proper Identification of Services

Quality Advisor/Consultant candidates

Comprehensive, unbiased evaluation of consulting services available to clients

Documented process to ensure best fiduciary practices

Client-Focused

- Retirement and Investment Consulting is 100% of our business.
- Comperio has no affiliation with any broker dealer or financial services firm.

Conflict-Free

- Serve as plan fiduciary for all clients.
- We do not provide or sell any personal investments to plan participants.

Experienced

- Technically oriented consultants that average 25 years experience in the retirement plan industry.
- Our consultants bring a unique perspective having worked both on the provider and plan sponsor side.

COMPERIO RETIREMENT CONSULTING, INC.

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