



MRI Investment Reviews

Dynamic approach to investment & fiduciary oversight
Plan success tracking & customized benchmarking

ABD Insights

Portfolio construction for optimal results
Diligent fee analysis & negotiations
Impactful plan design guidance
Vendor analysis & marketplace insight

ABD Learn

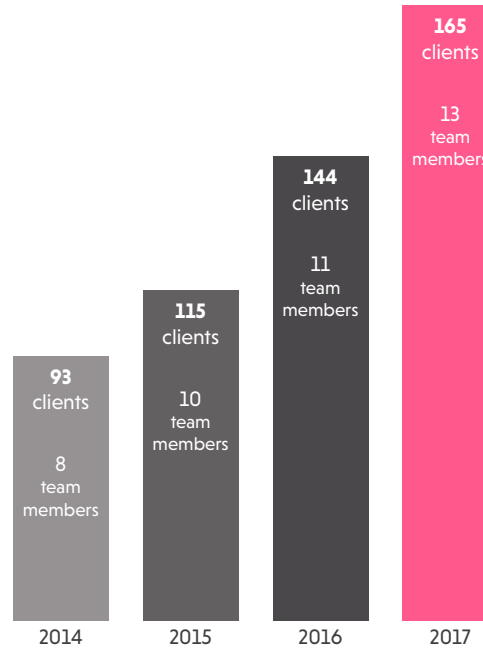
Customized participant education
On-site meetings & participant 1-on-1s

Fiduciary Support

ERISA guidance on compliance issues
Fiduciary documentation and compliance tracking

Advanced Project Management

Vendor interfacing & troubleshooting
Plan conversion strategy
Plan mergers & terminations



OUR TEAM

Exclusively retirement focused

13 team members

\$5 billion+ in assets under advisement

165 clients (26 publicly-traded)

Professional designations include:

CFP®, CIMA®, CRPS®, AIF®, JD

In-house ERISA counsel

WHAT MAKES US DIFFERENT ABD Retirement Services, Inc. is an independent financial consulting team focused exclusively on retirement plans. We believe that retirement readiness means achieving total financial wellness, which takes more than an off-the-shelf solution. We draw on our extensive investment and ERISA experience, knowledge of investor behavior, and the latest retirement trends to help our clients build industry-leading retirement plans that put employees on the right track for retirement.

