Integrity Respect Ingenuity Teamwork

OUR WORK WITH 401(K) PLANS

As a business owner/plan sponsor, you have many responsibilities to your employees. Offering a retirement plan to your employees is a great way to help them prepare for the future. With our team's experienced background and accreditation in the 401k space, we are able to provide dedicated services to help enhance your participant's knowledge and your responsibilities as an owner.

- Plan Structure/Design
    - Our team will conduct a review of your current plan structure and help identify areas of improvement, potential ways to maximize retirement savings, and help identify potential cost savings to you.
- Participant Engagement/Education
    - Our team will work directly with your participants to educate them on the 401k's benefits and features as well as an array of retirement and financial planning topics. We also offer one-on-one meetings with your participants as it pertains to their individual needs.
- Fiduciary Responsibility
    - Our team is qualified to act as a 338 or 321 advisor to help advise and limit your fiduciary responsibilities. We are also able to partner with firms that provide 316 solutions that can further limit your liability as a plan sponsor.

At Adams Wealth Management, we will relentlessly pursue your financial success and happiness. To learn more about our team, please contact Neil Adams or Kara Hill.

Neil Adams, CFP®, AIF

Managing Director, Senior Vice President of Investments

neil.adams@raymondjames.com // 314.214.2163

Kara Hill

Financial Advisor

kara.hill@raymondjames.com // 314.214.2188