

Risk and Reward

Why evaluating your workplace retirement plan's performance makes sense

An employee and company benefit

Like every other business asset, a workplace retirement plan should contribute to the success of your company. We will evaluate your workplace plan – at no cost and no obligation.

Our team of Registered Investment Advisors and plan designers will analyze the needs of your business and benchmark them against your industry. We will review your plan's design, assess compliance and risk, investment options, costs and more.

And then we will make recommendations you can put to work immediately.

Contact us today to schedule an appointment to learn more.

Examine costs, measure risk and determine the value of your plan

Our workplace retirement plan evaluation has only one objective: To ensure that this employee benefit also provides an advantage to your company.

Changes in federal regulations could mean that you - as the person who holds fiduciary responsibility for the plan - and your company are currently at risk.

Meanwhile, limited investment choices and the bundled-fee approach of many retirement plan providers may mean that you and your employees are not getting the best bang for your buck.

Complimentary, No Obligation Plan Evaluation

We have designed our workplace retirement plan performance evaluation to provide you with real value:

- Our analysis will assist you in identifying any compliance risk you are currently exposed to as the trustee of your company's retirement plan.
- We aim to provide you with wider investment options, recommendations on recordkeeping, ways to enhance employee participation and retirement readiness, an assessment of your overall plan design and complete transparency on plan costs.

For More Information On How To Get Started

Visit www.bradwayfinancial.com/B2B

BRADWAY FINANCIAL
Plan First, Then Invest



Business to Business

Acting in Your Best Interests

It's what makes Bradway different

Independence

As an independent Registered Investment Advisor, we work for you. We don't accept commissions, so you know you are getting unbiased investment advice. And unlike Wall Street firms and their brokers, we're legally required to act in the best interests of each client. We also happen to think that's the right way - and the only way - to do business.

Experience

Our team of three financial advisors - Brian K. Case CFP, Craig A. Roncaioli ChFC, and Rick Duncan - has a combined eight decades of financial planning and investment management experience.

Expertise

We specialize in designing retirement plans that meet the complex needs of your business.

Our Retirement Plan Team

Creating benefit plans that answer the needs of both executives and employees is a complex endeavor. The team at Bradway Financial has the expertise to ensure that both levels are satisfied - and that your company's plan remains in compliance with regulations.



From her years as general counsel for Travelers Insurance Companies and executive vice president for Citigroup International, Bradway B2B Partner Kate Sullivan knows top benefit providers and the plans they offer.



Howard Berkowitz brings a solid business background to Bradway B2B. He works with our advisors, third-party administrators and plan designers to ensure that workplace retirement plans are appropriately implemented.



For more than 25 years, Chartered Financial Consultant Craig Roncaioli has been weaving together the technical and the personal by using his financial planning and investment management skills to support clients' long-term goals.

As an independent firm, we can shop the industry for administrators, offer a wide range of investment options, manage plan investments and provide investment advice and ongoing education for plan participants.

Once Your Plan Is In Place, We Will Regularly Evaluate It So That It Keeps Pace With Your Business and Regulatory Changes

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