



Employer Connect | Your World Evolves and Your Retirement Plan Should, Too

MAKING IT ACTIONABLE

The written version of your retirement plan—your “**plan document**”—defines how the plan operates. When you started your plan, it reflected you and your company at that moment.

As time passes, however, many things in your world may change. Any of them could be a good reason to meet with us to make sure your plan is aligned with your evolving needs and goals.

For example:

- Your workforce may grow as your business grows.
- Your org chart may become more complex as you add new products and services.
- Your company may begin to serve new locations and customers.
- Your industry may become more competitive, causing you to evolve your strategy for attracting new talent.
- You may want to seek ways to keep the talented people you already have.

As your business’s profitability changes, so may your income and opportunity to save for your own future.

ACTIONS TO TAKE NOW

Any of these changes may have implications on how your retirement plan benefits you and your employees. Our goal is to make sure your plan takes advantage of the latest tools and design options to optimize its potential and performance for you.

If there’s anything new in your world, let’s talk.