

FIDUCIARY TIP #6

Hire an independent fiduciary to evaluate and optimize your existing 401(k) plan.

Did you know? When it comes to financial advice not all sources are objective, and many are influenced by commissions and other incentives. Only an independent, truly unbiased expert opinion can help you make the most of your existing 401(k) plan – and that’s where CapTrust comes in.

We pride ourselves on our ability to serve as an objective and unbiased third party, helping clients evaluate the many alternatives

to determine the right service provider, investment menu, and other related services. With a fee-based approach, CapTrust serves as a fiduciary and is not influenced by commissions and revenue sharing payments.

CapTrust can evaluate your current plan and identify its strengths, weaknesses and where there’s room for improvement. To learn more, please contact CapTrust at 401k@captrust.com or at (888) 697-5908.

This and other valuable Tips for Fiduciaries are brought to you by CapTrust, an independent retirement plan and investment consulting firm providing institutional fiduciary services. To learn more, please contact us at **(888) 697-5908** or email **401k@captrust.com**.



John Griffith has over 25 years of experience and serves as an investment consultant to many of Florida's finest business corporations, municipal authorities, hospitals and non-profit corporations.



Shelley Bussinah has more than 16 years experience dealing with qualified retirement plans with an emphasis on employee education, client servicing, plan design, investments, administration, and the retirement plan conversion process.



Eric Bailey is a founding principal of CapTrust and leads the retirement plan practice of the firm. With over X years of experience, he has undergone three years of advanced study in the complex issues of investment management and has earned the right to use the Chartered Financial Analyst® designation.



Jeb Graham provides institutional investment consulting services to committees of both public and private sector retirement plans. With over two decades of experience, he is well respected in the retirement plans industry and frequently quoted as an industry expert.



James Waters has over 35 years of experience providing consulting expertise in all aspects of the creation, funding, portfolio management, and administration of qualified retirement plans and executive compensation arrangements.

Tampa Headquarters

CapTrust Building
102 W. Whiting Street, Ste. 400
Tampa, FL 33602
Phone: (813) 218-5000
Toll Free: (888) 697-5908

Miami Office

11900 Biscayne Blvd, Suite 780
Miami, FL 33181
Phone: (305) 892-0420
Toll Free: (888) 697-5908

Southwest Florida Office

Beachway Professional Center
3301 Bonita Beach Rd, SW, Ste. 305
Bonita Springs, FL 34134
Phone: (239) 948-8894
Toll Free: (888) 697-5908

Northern Michigan Office

210 E. Main Street, Suite 8
Harbor Springs, MI 49740
Phone: (231) 526-8200
Toll Free: (888) 697-5908

CapTrust Advisors, LLC is a Registered Investment Advisor with the SEC. CapTrust is not a legal or Tax advisor.