Tomorrow's opportunities start today.

DOMANI WEALTH

Solutions & Resources: Business Retirement Plan Services

At Domani Wealth, we strive to see tomorrow the way you do. That's why we start each conversation by asking, "What does your tomorrow look like?"

To answer that, we've compiled some thoughtful questions to help you plan for the future and to gain insight on the services and experience we offer as an independent wealth advisory firm. Because at Domani Wealth, our focus is to lead you to a tomorrow filled with possibilities.

Are you confident in your business retirement plan?

As a business owner, you have many hats to wear. And you have many exciting — and challenging — things to manage each day. Worrying about whether you have the best business retirement plan in place for you and your employees shouldn't be one of them.

Whether you're a small family-owned business with a dozen employees, or a large company with hundreds of employees, Domani Wealth understands the critical importance of having a retirement plan that offers customized solutions for plan fiduciaries and their participants.

Your Domani Wealth advisors will help determine the most cost-effective, easy-to-manage retirement plan for your business. Our comprehensive offering of business retirement services includes:

Sponsor Services

Plan Design and Consulting

- Recommend plan type (defined contribution, defined benefit, etc.)
- Recommend benefits and features
- IRS and DOL requirements, limitations, and reporting

Custody, Recordkeeping, and Administration

- Review and analyze recordkeeper and TPAs
- Assist with plan installation
- Plan benchmarking
- Expense management
- Fiduciary guidance
- Administrative support

Investment Advice and Monitoring

- Develop investment lineup
- Ongoing investment due diligence and monitoring
- Performance reporting with recommendations
- Benchmarking of plan to peer group
- Design and monitor portfolio allocation models

Participant Services

- Enrollment
- Participant education
- Periodic updates
- Participant support

Please See Reverse Side for Important Disclosure

IMPORTANT DISCLOSURE INFORMATION

Past performance may not be indicative of future results and different types of investments involve varying degrees of risk. Therefore, it should not be assumed that future performance of any specific investment or investment strategy (including the investments and/or investment strategies recommended and/or undertaken by Domani Wealth, LLC), advice, or any non-investment related services, will be profitable, equal any historical performance level(s), be suitable for your portfolio or individual situation, provide security or prove successful. Domani Wealth is neither a law firm nor accounting firm, and no portion of its services should be construed as legal or accounting advice.

A copy of our current written disclosure Brochure discussing our advisory services and fees is available upon request. The scope of the services provided depends upon the needs of the client and the terms of the engagement.