

Twin Peaks provides consulting to employer-sponsored retirement plans such as 401(k) and 403(b) plans, pension and profit sharing plans, cash balance plans, and deferred compensation plans.

We also offer discretionary management of retirement-plan assets. And we act as a limited-scope fiduciary in assisting plan sponsors with investment decisions. Our services include:

- Providing investment advice about asset classes and investment alternatives based on the plan's investment policies and objectives.
- Providing assistance with the development of an investment policy statement, which establishes the investment policies and objectives for the plan.
- Helping to monitor investment options by preparing periodic reports on investment performance, consistency of fund management and other matters.
- Assisting in group enrollment meetings designed to demonstrate a retirement plan's value and/or maximize employee participation.

### **The Twin Peaks Advantage**

Employers who work with us know that they can count on unbiased professional advice, full disclosure of material conflicts of interest (if any), and full fee disclosure. Our single goal is to support you making your retirement plan as successful as possible.