

Build a Better Retirement Program

Being an independent school comes with significant challenges.

The constant pressure to increase enrollment, improve fundraising and retain the best teachers is likely top of mind for your administration. Making the most of every dollar while simultaneously creating a personalized, integrated experience for your team can ensure that you are an **employer of choice.**



Fiduciary Duty and Liability



Fees and Service Level



Financial Wellness Support

Let our team of independent retirement plan consultants provide a holistic review of your retirement plan, including in-depth analysis and recommendations at **no cost.**

A We Understand the Assignment

- ✓ 50 years + experience working with retirement plans
- ✓ 30 years + with independent schools
- ✓ Over 300 school clients
- ✓ Over 200 independent school clients
- ✓ \$3 Billion in school retirement plan assets
- ✓ Fiduciary Investment Advisory Services
- ✓ Plan administration and compliance
- ✓ Faculty group education and one on ones



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Investment advice offered through OneDigital Investment Advisors, an SEC-registered investment adviser and wholly owned subsidiary of OneDigital.