

Retirement Plan Process



Plan Design

There are many retirement plan options available, so our process confirms which plan design will work best based on your objectives. We will then execute any changes that may be needed.



Investment Due Diligence

We create an investment policy statement and assemble an appropriate investment lineup. An ongoing monitoring program is put in place to maintain a prudent investment lineup and help the Company meet its fiduciary responsibilities. Cornerstone Planning Group may act as a Co-Fiduciary to the Company regarding the investments in the retirement plan.*



Education & Enrollment

Our team will conduct education and enrollment to help the employees understand the benefits of the plan and answer any questions they may have. We will design the participant engagements to meet your standards and schedule.

350 Passaic Ave, Suite 201 Fairfield, NJ 07004 | cspgllc.com | 973-487-3220 | info@cspgllc.com

*Subject to Company approval and vendor availability. Cornerstone Planning Group can act as the 3(21) or 3(38) Investment Advisor. Roles can be different based on your situation. Cornerstone Planning Group is a SEC registered advisory firm. For more information regarding Cornerstone Planning Group please refer to [Welcome to Investor.gov/CRS](http://Welcome.to.Investor.gov/CRS) | Investor.gov Cornerstone Planning Group its agents, and employees do not provide legal or accounting advice.