

## advizrs: Serving Retirement Plan Fiduciaries

Managing your retirement plan benefit from A to Z

### Experience Matters

We focus solely on managing corporate retirement plans with over 35 years of combined experience. We assist plan sponsors with navigating the complexities of ERISA through an independent and unbiased approach and balance corporate objectives with creating successful opportunities for plan participants to reach their retirement goals. In the complex world of retirement plans, having an experienced and specialized team provides value and saves our clients time.

### Process Matters

We offer a retirement plan process designed to enhance your fiduciary liability protection, but also create an opportunity for plan participants to reach their retirement goals. Our team will help design and implement a process allowing clients to make informed decisions or we can take on a fiduciary role that minimizes employer involvement. We start with reviewing the roles and responsibilities of managing a retirement plan benefit, then we establish goals and objectives for the plan. Our in-depth industry knowledge, tools, and resources are key to helping clients manage their retirement plan benefit from A to Z.

### Z Plan Optimization

We begin with the end in mind. Starting with “Z” – providing every plan participant with the opportunity to reach their retirement goals. In order to achieve that goal, we work together to deliver effective solutions regarding the cornerstones of a retirement plan:

- Plan design
- Plan investments
- Plan costs
- Participant education and communication

ERISA clearly states: Every decision you make as a fiduciary must be in the best interest of plan participants and their beneficiaries. As your plan advocate, our services help you make informed decisions and include:

- Vendor benchmarking and fee analysis
- Plan design consultation
- Plan investment due diligence
- Participant education

At Advizrs, we care deeply about educating our clients and their employees on the options, services, and strategies available for creating a healthy retirement plan. On an ongoing basis, our consultants are highly involved with every aspect of the plan and work with plan sponsors to create an effective service team.

**Contact us today to experience the Z Advantage and learn how we can become your retirement plan advocate.**

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### Kelly Carlson, AIF®, CFS®, CPFA Managing Director, Retirement Consultant

Kelly graduated from Florida State University with a Bachelor of Science degree in accounting. She began her career in 1993 as a pension plan administrator and later founded Advizrs, an independent retirement plan consulting firm. She has more than 20 years in the industry and acts as Managing Director with the goal of helping plan sponsors and plan participants construct their retirement strategy.

Having serviced hundreds of retirement plans during her career, Kelly stands out as a specialist in the field of retirement services. Kelly is an investment advisor representative who holds FINRA Series 6, 7, 26, 63, and 65 licenses as well as the Florida state insurance license. She is an Accredited Investment Fiduciary® (AIF®), a Certified Fund Specialist® (CFS®), and a Certified Plan Fiduciary Advisor (CPFA). Kelly also devotes her time to professional organizations in the industry, such as American Society of Pension Professionals and Actuaries (ASPPA), Florida West Coast Employee Benefits Council, and Women in Pensions Network.

In 2015, Kelly was awarded the NAPA Top Women Advisor\* honor.

Kelly lives in DeLand with her husband, Jim, and has two boys, Graham and Davis. She enjoys spending time with her family, running, and traveling.