



### Fully Managed Solution

- Manage relationships with/between Client, Investment Provider, Record-Keeper, TPA and Payroll Company Planning

### Exceptional Client Service

- Dedicated Group Retirement Specialist
- Dedicated in-house Plan Relationship Coordinator
- Your Team of Professionals
  - Certified Public Accountant
  - Certified Financial Planner
  - Chartered Life Underwriter
  - Certified Fund Specialist

### Plan Investments

- Assists in investment selection and monitoring
- Choice and flexibility
- Access to professionally managed asset allocation portfolios
- A team of experienced investment professionals

### Plan Sponsor Consulting

- Designs a cost-effective, high quality, comprehensive retirement plan
- Maximizes the value for your business
- Income Tax Strategies from Certified Public Accountants
- Enhances Benefits to Owners and Key Employees
- Workforce Retention
- Fiduciary guidance to meet legal obligations and manage risk
- Assistance with year-end census, contributions, distributions, loans, etc/troubleshooting
- Integrated Payroll and 401(k)

### Employee Education and Communication

- Customized enrollment experience
- Investment education
- Proper asset allocation and diversification
- Planning for retirement
- Account management support

Securities offered through 1st Global Capital Corp., Member FINRA/SIPC.  
Investment Advisory Services, including fee-based asset management accounts held through NFS, LLC are offered through 1st Global Advisors, Inc.  
All other financial planning services are offered through Mueller Financial Services, Inc. Mueller Financial Services, Inc. and 1st Global Capital Corp. are unaffiliated entities.

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