



Corporate Retirement Plans

Extensive Experience and True Commitment

VestGen Downers Grove provides comprehensive retirement plan services to corporations. Our experiences in this unique area of the marketplace dates back to 1994, as the retirement plan industry was just beginning to evolve. Over the years, this marketplace has changed tremendously and continues to evolve as employers seek to provide the best plan possible for their employees. Our commitment to excellence in this marketplace has made us a trusted advisor to our clients.

Pursuing Plan Success

We listen to our client's needs and help identify what options are suitable for both themselves as well as their employee base. We counsel our clients on plan design, integration, and cost savings recommendations. We utilize industry benchmarks to help our clients understand where they rank against other plans of their size and help identify areas of improvement.

Our Process

- Needs assessment of both employer and employees.
- Analysis of current plan.
- Human Resources integration.
- Plan design consulting including:
 - Roth deferrals
 - Auto Enrollment
 - Auto Escalation
- Holistic employee communication and education campaigns.
- Individual plan participant consultation.
- Retirement Plan Benchmarking (Using comprehensive fi360® technology)

WHAT FI360 HAS TO SAY

Fi360 helps financial intermediaries use prudent fiduciary practices to profitably gather, grow and protect investors' assets. Since 1999, Fi360 has been providing innovative solutions to financial services providers, including the AIF® and AIFA® Designation programs, the Fi360 Toolkit™ software and the Fi360 Fiduciary Score®. Fi360 provides an excellent portfolio/plan-level summary covering aspects such as diversification/asset allocation, style analysis, investment performance, expenses, the Fi360 Fiduciary Score®, investment commentary, and Watch List status.

WHAT WE HAVE TO SAY

Fi360 allows us to monitor investment portfolios on a microscopic level by providing statistics and metrics of individual holdings and portfolios as a whole. From a singular investment account for an individual all the way up the holdings offered in a company sponsored defined contribution retirement plan, this software is a one - stop shop for performance metrics and reporting. The Fi360 fiduciary score, and customizable watch criteria allow us to key in on characteristics of each holding to verify those that meet our objectives and identify those that could be improved. The Fi360 score considers Alpha, Sharpe ratio, 1, 3, 5, and 10 - year returns, expense ratios, and more to compare individual holdings among its peer group and return a score that indicates its rank in that group. Listed below is more detail on the scoring methodology and a handful of sample reports from this software.