

Retirement Plan Services



Retirement plans are a critical part of attracting and retaining top talent.

At the same time, plan sponsors must navigate complex fiduciary responsibilities and evolving regulatory requirements. Sikich provides independent, customized retirement plan consulting to help you strengthen plan outcomes, fulfill fiduciary obligations, and deliver a competitive employee benefit all while simplifying plan oversight and administration.

Education and training

Understand and acknowledge your basic fiduciary responsibilities under ERISA with Plan Sponsor and Retirement Plan Committee Fiduciary Education.

Prudent investment practices

Develop and maintain your Investment Policy Statement to provide a documented due diligence process to select, monitor, remove and replace under-performing funds in the platform.

Retirement plan fiduciary assessments

Receive expert guidance in reviewing current practices to determine if fiduciary shortfalls exist and receive recommendations for improving compliance

Discretionary trustee services

Research, select and independently monitor a discretionary trustee who assumes full fiduciary responsibility from you for selection and prudent management of investments offered in the plan.

Open architecture trading platform and professionally managed portfolios

Access world-class mutual funds in each investment category for a true open architecture and revenue neutral investment trading platform. Managed model portfolios built from underlying holdings and based on the risk tolerance of the participant will assist in proper asset allocation.

Full and transparent fee disclosure

Receive quarterly review of fees according to the Department of Labor Model Fee Disclosure, including all revenue sharing payments associated with operating the plan, to ensure all fees are fair and reasonable as required under ERISA.



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