

Participant education



RETIREMENT PLAN SERVICES RESOURCES

With multiple generations in the workforce, modern retirement plans must cater to a diverse range of participants by using emerging technologies and innovative experiences to guide them toward better financial decisions.*

Allow our Sikich Financial experts help your employees reach their full retirement savings potential through our educational solutions.

Virtual education

- Live webinars
- Recorded webinars
- Extensive video library
- 1:1 virtual meetings



In-person education

Sikich Financial professionals can travel to meet with employees on-site for benefits fairs or dedicated sessions, including or independent of your plan recordkeeper. This structure works well when employees are concentrated in a few locations.

- Group sessions
- 1:1 sessions
- Combination

Educational topics

- Will I have enough to retire?
- The importance of emergency accounts and spending plans
- Basic investment principles
- Impact of inflation
- Roth or traditional contributions

Monthly employee newsletters



Participant helpline

Participants have direct access to licensed Sikich Financial professionals to get personalized investment and/or plan-related guidance and assistance.

*Vanguard How America Saves 2025



Joe Connell, AIFA®, QPFC, CRPS®, RF™
PRINCIPAL

+1 (331) 229-5235
joe.connell@sikich.com

Gretchen Radach, MBA, CPFA®
SR. RELATIONSHIP MANAGER

+1 (312) 648-6644
gretchen.radach@sikich.com

For more information
about our services, visit
www.sikich.com.