Retirement Plan Services - Non-Profits

Why – Non-Profits are Different

Historically, non-profit organizations have chosen to offer rich benefit packages – including their retirement plans. We have found that while their missions, the regulatory environment, and participant needs have evolved – their retirement plans have not.

Unfortunately, we have found that to solve these challenges, these organization turn to advisors that specialize in 401k plan for corporations. But non-profits are different - each organization is unique and deserves an advisory team that listens to their goals and understands the available solutions.

Who – We Are Veery

Veery Capital is one of the largest retirement plan consultants in the region. We have over $455 million in retirement plan assets under advisement (as of September 2021). We have an entire team focused solely on retirement plans. We deliver the services below to protect the plan sponsors and help you deliver a best-in-class retirement plan for your company and your employees.

Our community involvement, and commitment to making a difference for the institutions we serve, drives us to deliver the retirement plan solutions they deserve.

At Veery Capital, we will work with you to:

- Advance Your Mission
- Recruit & Retain Employees
- Mitigate Risk to the Committee

How – Our Expertise Makes a Difference

Veery Capital specializes in the unique needs of non-profit retirement plans. Our clients include Universities, Independent Schools and Service Organizations. We are uniquely qualified to help Non-Profits because we strive to understand the importance of your mission and the culture of your organization.

We're experts at dissecting and remediating potential plan design problems that can negatively influence participant outcomes and lead to unexpected workforce costs and litigation risk.

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What – Examples of Where We Make a Difference

Fiduciary Compliance

- Review current fiduciary process
- Support committee with best-in-class process

Plan Design

- Review current benefit structure
- Work with committee to update design to match current needs

Provider Negotiations

- Analyze current providers – fees and services
- Explore opportunities to maximize impact of retirement benefit

Investment Analysis

- Ensure appropriate menu design
- Many 403b plans include annuities which can be quite complex
- Share classes impact pricing and need to be understood

Target Date Fund Consulting

- Analyze current TDF's and compare them to specific needs of participants.
- Educate committee and discuss the differences between many of the most popular TDFs (built primarily to fit corporate 401(k) plans) and the availability of custom solutions that are specifically designed to accommodate the needs of many non-profits

Participant Services

- Design a holistic, individual, participant education strategy that fits the institution's culture
- Measure success, report to committee and adjust as needed improve effectiveness

Retirement Planning Services & More

At Veery Capital, our mission is to help your participants retire with dignity, while protecting you in your role as fiduciary.

For more information, contact us at 302-660-3350 or visit veerycapital.com