Retirement Plan Services

Who We Are

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

Plan Design

- Review current plan design and compare it to current company goals
- Identify and discuss strengths and weaknesses in current retirement plan
- Recommend changes to plan design as necessary to improve impact and align with company version

Fee Benchmarking & Provider Negotiations

Identify and explain all fees of current plan to Plan Sponsor, including:

- Recordkeeper Fees
- Investment Fees (and Revenue Sharing)
- Advisor Fees
- Administrator Fees

Compare current fees to like plans, with similar:

- Asset Size
- Number of Participants
- Services Provided

Identify ability to negotiate and reduce fees

Investment Analysis

- Review Investment Policy Statement for accuracy and compliance
- Review fund menu for asset class coverage consistent with 404c requirements
- Educate Plan Sponsor of “Veery Efficient Menu” design
- Rank and compare funds using state of the art analysis system ScoreCard™
- Select, monitor and replace funds in coordination with investment policy statement

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Target Date Fund Consulting

- Discuss the importance of existing Qualified Default Investment Alternative (QDIA) – typically Target Date Funds (TDFs)
- Analyze current TDF options considering Department of Labor guidance
- Introduce custom TDFs and compare to current options for appropriateness
- Educate participants on the benefits of professionally managed, age and risk adjusted, TDFs.

Fiduciary Compliance

- Review current fiduciary process
- Introduce fiduciary system that includes Committee Charter, Coordinated Investment Policy Statement and Meeting Minutes tools
- Explain Fiduciary Options – 3(21) and 3(38) (We are able to act as either).
- Educate fiduciaries on relevant topics as recommended by DOL best practices.

Participant Services

- Strategic approach to impactful education
- Employee education staff members, accessible for helplines, group education, enrollment meetings and one-on-one sessions
- State of the art Financial Wellness program (WellCents) to work with employees across all of their financial concerns.

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 to the retirement plan.

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