



A&I FINANCIAL SERVICES LLC
Optimizing Assets and Income

A Superior 401k Experience

401k Solutions

Grow your wealth, protect your hard work and choose how you want to be taxed SM

Smooth Sailing Retirement Plans

Employees and employers depend upon the 401k as an integral part of their overall financial plan. But many plans are clunky, underperforming vessels carrying a lot of dead weight in underperforming investments, extra fees, and confusing or non-existent participant support. A&I Financial Services optimizes the three main parts of a successful retirement plan. Then, we revisit each part at regular intervals to keep the plan sailing smoothly.

Plan Design and Administration:

Chart the course! Select the best plan provider for your needs. Fine-tune the plan with design and investment options. Guide your plan administrator towards best practices. Simplify, customize, reduce costs and evaluate regularly with proven success metrics.

Investment Policies

Trim the sails! Investment Policy Statement aligns employer goals and participants' investment knowledge. We conduct regular reviews with the plan sponsor. A higher performing plan creates more satisfied participants.

Education & Communication

All hands on deck! We offer excellent communications, weekly newsletters, easy to understand web sites, and regular education events. By providing personal financial advice, we go beyond the enrollment meeting to make a meaningful difference in participants' lives.

Well-calibrated plans provide greater fiduciary security, ease of administration, better investment selection, more employee participation, and improved cost efficiency.

The Superior 401k plan increases plan performance, delivers greater value for the cost, and helps employees set sail for their own smooth retirements.



About A&I Financial Services LLC

Since 1986, our locally-owned, independent financial advisory firm has helped families and businesses grow their wealth, protect their hard work and choose how they want to be taxed. AIFS combines a small-company attention to details and customer service with systematic processes for compliance monitoring, fiduciary security and investment review. We enable our business clients to sleep soundly and focus their attention on their own business, instead of on employee benefits.

Learn how A & I Financial Services can help transform your 401k into a benefit that rewards both plan sponsors and participants.