



# GEIER ASSET

Geier Asset Management, Inc.

## Retirement Plan Solutions

### Comprehensive Retirement Plan Expertise

At Geier Asset Management, Inc. we understand that your organization's retirement plan helps you attract and retain the employees you need to grow your business. However, finding the best retirement solution with the right mix of investment products and services can be a daunting and time-consuming task. Ongoing monitoring of the investments within the plan also requires diligent investment expertise and insight.

That's why Geier Asset Management has partnered with Columbia Benefits Consultants, Inc. to create comprehensive retirement plan solutions for businesses like yours. Solutions that work for both the plan sponsor and plan participants.

#### Our capabilities include:

- ☑ **Defined contribution plans** – 401(k) and/or profit sharing plans
  - » safe harbor plans
  - » new comparability plans
  - » automatic enrollment plans
- ☑ **Defined benefit plans** – company sponsored pension plans
- ☑ **Combination plans** – include the best elements from both defined contribution and defined benefit plans
- ☑ **Nonqualified deferred compensation plans**
- ☑ **Plan design and fee analysis**
- ☑ **A wide variety of investment options**
- ☑ **Assistance with fiduciary protection**
- ☑ **Full fee disclosure**
- ☑ **Assistance with participant education**

#### Our Three-Step Process For Determining Your Retirement Plan Needs

We use the following three step process to ensure that we provide a retirement plan that meets your needs now and in the future:

**Step 1:** Understand your goals and objectives for your retirement plan.

**Step 2:** Construct a customized retirement plan that includes a range of investment options. We work with each plan sponsor to design an Investment Policy Statement that aligns with their objectives.

**Step 3:** Provide ongoing oversight and monitoring of the investments to ensure that you are providing high-quality solutions for your employees.



#### About Geier Asset Management

Geier Asset Management, the investment management arm of Geier Financial Group, provides the investment management for the retirement plans offered by Geier Financial Group.

#### About Geier Financial Group

Geier Financial Group is an independent, financial services firm dedicated to helping plan sponsors grow, protect, and conserve their retirement plan assets.

#### About Columbia Benefits Consultants, Inc.

Columbia Benefits Consultants, Inc. is a retirement plan third-party administration and recordkeeping firm focused on helping clients secure the financial future for themselves and their employees.

*(please see reverse side)*



## Investment Management Expertise

Geier Asset Management provides investment management for your retirement plans.

A rigorous proprietary investment selection process is employed to provide high-quality mutual funds for your retirement plan.

State-of-the-art recordkeeping and plan administration is provided by Columbia Benefits Consultants, Inc.

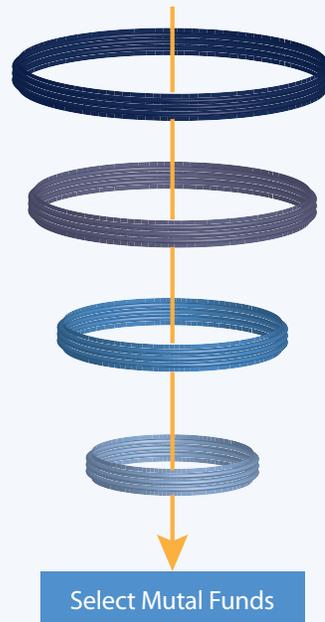
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## Choosing Investments For Your Plan

Geier Asset Management, the investment management arm of Geier Financial Group, uses a rigorous and disciplined investment process to select the most appropriate investments for your retirement plan.

This process employs four screens that include both quantitative and qualitative analysis to identify high-quality mutual funds that meet specific criteria in terms of portfolio characteristics, performance and portfolio manager credentials.

### Our Rigorous Investment Selection Process



**Screen 1:** by asset class, category, performance and expense ratio

**Screen 2:** manager tenure, assets under management, turnover ratio

**Screen 3:** quantitative metrics including Alpha, Beta, R-Squared, Sharpe ratio

**Screen 4:** qualitative metrics including management credentials, fund strategy and objective

Select Mutual Funds

## Our Role As Plan Sponsor Advocate

We at Geier Asset Management and Columbia Benefits Consultants, Inc. are committed to the success of our clients. An experienced Relationship Manager will be assigned to you to facilitate the smooth operation of your plan. Our team will work on your behalf to maintain the quality and efficiency of your plan.

## Our Role As Plan Participant Advocate

The success of your retirement plan depends upon the ability to effectively communicate the benefits of your plan to your employee participants. We can provide your employees with investment education designed to enhance plan participation and answer any questions they may have.

## Getting Started

Talk with us about how we can help your company meet its retirement plan goals. We can work with you to implement a comprehensive and flexible retirement plan that will benefit both plan sponsor and participants as your business continues to evolve and grow.