

WALL TITUS

A BETTER RETIREMENT PLAN

*Investment services provided by Wall Advisors, Inc.
A Registered Investment Advisor

Wall Advisors works with clients to meet their employee benefit plan needs. A company may be looking for better investment options, a more cost effective plan design or a higher level of service. Our firm provides comprehensive advice and service to the company's retirement plan.

HIGHLIGHTS

- Investment management and plan administration coordinated by one company
- Independent - not affiliated with a mutual fund family or insurance company
- Open architecture platform - Investment Committee chooses from thousands of mutual funds and ETFs
- Transparent and easily understood fee structure
- Consulting and plan design services
- Serves as highest level [section 3(38)] Investment Fiduciary
- Ongoing plan review and employee education meetings
- Personal account service for each client with assigned dedicated advisor

401(k) TOTAL

401(k) Total, an offering by Wall Advisors, incorporates investment management and plan administration into a single system. The program alleviates administrative issues for the plan sponsor and gives the employees a higher level of service. 401(k) Total's fee structure is transparent and competitive which is beneficial to the plan.

401 k TOTAL

Your total retirement plan solution.

Wall Advisors as the Co-Fiduciary

Wall Advisors serves as an ERISA 3(38) Investment Fiduciary, making the investment management decisions, monitoring the investments, and allocating assets so the plan sponsor does not have to.

WALL
TITUS | accountants
consultants
wealth advisors

Learn more at WallTitus.com

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ABOUT WALL ADVISORS

Wall Advisors is a Registered Investment Advisory firm located in Lakeland, FL. In addition to investment management of plan assets, Wall Advisors coordinates retirement plan design and administration services. Whether your company has an existing plan or is considering starting a new plan, we can assist in the coordinating administration and design of a retirement plan that best fits your company. Our goal is to provide service in your best interests, by fully understanding your financial goals. We are a fee only firm, meaning the service and advice we provide are independent and unbiased. Learn more at **WallTitus.com**.

“Our goal is to work with clients to design and manage an optimal retirement plan solution. This solution must simultaneously align with company goals and empower employees to prepare for their future.”

– H. Lee Wall, CPA/PFS, CFP®
President
Wall Advisors, Inc



Learn more at **WallTitus.com**

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EXPERIENCE THE WALL ADVISORS ADVANTAGE

- Independence – no commissions, free from quotas
- Discipline – a data-and-detail driven approach with in-depth research and reliable follow through
- Better return on relationships – advisors passionately committed to seeing you and your employees well prepared for retirement

SERVING CORPORATE RETIREMENT PLANS RANGING FROM A FEW TO THOUSANDS OF EMPLOYEES

Wall Advisors 401(k) Total covers a wide-range of corporate retirement plan needs, including:

- Investment management
- Daily participant recordkeeping
- Plan administration
- Compliance testing
- Government reporting
- Employee education meetings
- Documented annual plan reviews

*Plan administration, testing and government reporting provided by TD Ameritrade

For a complimentary plan assessment or to find out how we can help you, meet our team at **WallTitus.com** or contact us:

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