

# The Karp Capital Advantage



It is our goal to show you the way to a successful retirement plan. With Karp Capital there is a single point of contact to manage your entire retirement plan. We explain how the plan works and what your responsibilities are as the plan sponsor.

## PLAN & VENDOR EVALUATION

Selecting the best of the best

- Working with the plan sponsor to determine the type of retirement plan and investment menu to meet their requirements
- Identify Third Party Administrator that will complement the plan sponsor's business model to create a custom plan design to meet the company's objectives
- Karp Capital Management's strategic partners are major investment providers that offer comprehensive investment platforms to choose from to meet the company's needs

## IMPLEMENTATION

We coordinate the process to leverage your time

- Investment platform proposals are signature ready
- Transfer & termination letters are prepared and signature ready
- Payroll interface training provided
- Documentation gathering and Third Party Administrator notices are coordinated for you

## COMMUNICATION

Knowledgeable participants make better investment decisions

- Enrollment meetings held on site with bi-lingual enrollers from the Bay Area
- Customized enrollment kits tailored for your company that outline benefits of contributing to a retirement plan, setting goals and choosing investment options

## POST ENROLLMENT

We make it our business to be with you every step of the way

- Participants have access to professional investment advisors
- Web site access for participants, trustees, third party administrators to access accounts, make changes, monitor performance
- Quarterly participant statements are comprehensive and include performance, goals, comparison to benchmarks & returns
- Karp Capital Management quarterly newsletter which outlines investment trends and other retirement planning issues
- On site educational seminars

## Why companies choose us... we answer to You

### THE KARP CAPITAL ADVANTAGE FOR YOUR COMPANY MEANS:

- Helping you meet your fiduciary obligations
- Providing local support and service
- Designing a plan that attracts and retains qualified employees
- Offering you simplified administration
- Comprehensive monitoring of investment performance
- Coordinating a team of experts for each component of the plan

### THE KARP CAPITAL ADVANTAGE FOR YOUR EMPLOYEES MEANS:

- Educating them on the benefits of a company retirement plan
- Offering them a broad & diversified range of investment options
- Simple monitoring of accounts & investments
- Providing them access to investment professionals
- Showing them you care about their future