# Fiduciary Advisory Service Overview

**Everything we do is about helping your employees with their investment management decisions—and helping you manage the entire process smoothly.**

## Plan Sponsor Services

### Kick-off Meeting

Introduction to your Plan Advisor who will set the foundation for the investment committee.

### Fiduciary Training

Our team of experts educates those in decision-making roles about the duties and responsibilities of plan fiduciaries.

### Trustee Meetings

Create or review the Investment Policy Statement, review investments, and discuss short- and long-term goals.

### Comprehensive Quarterly Investment Analysis & Reporting

Utilizing our proprietary fiduciary governance system, we provide customized reports to measure, monitor and track fund performance on a quantitative and qualitative basis.

### Sentinel Vault

Secure, cloud solution housing fiduciary reports and other plan information, including plan documents, Investment Policy Statement, quarterly investment reports, and meeting minutes.

### Quarterly Market Update

Each quarter, Chief Investment Officer Matt McPhail provides information about the latest stock market trends and developments in today's economy as well as how these trends affect the mutual funds held in Sentinel's portfolios. This information is also availalable to plan participants.

### HRoundtable

Each quarter, HR professionals meet at our offices for interactive discussions on varying topics and issues such as workplace initiatives, strategic ideas for achieving organizations goals, and other employee benefit trends.

### Live Educational Meetings & Events

Enjoy opportunities to participate in our Client Clinic and Benefits Beat webinars and attend live events, such as our annual Educational Exchange and Lunch & Learn sessions that cover a variety of employee benefit related topics.

## Plan Participant Services

### Group Meetings

Your Investment Consultant will lead group enrollment meetings and/or educational workshops onsite at your office.

### One-on-One Meetings

Personal financial planning meetings with your dedicated Investment Consultant to discuss and advise on retirement planning and investment strategy.

### Live Educational Meetings & Webinars

Join us for virtual or in-person events covering a variety of topics to help participants attain financial wellness, including financial planning basics, college savings, long-term care, estate planning, and more.

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### TotalWealth

Access to an industry-leading platform that seamlessly aggregates all accounts in one place, painting a holistic financial picture for participants and their advisor, allowing them to easily manage their complete financial landscape.

### Health & Wealth Hub

Read articles and watch videos on a range of financial wellness topics from budgeting to saving for retirement.

## Your Sentinel Advisory Team

### Account Executive

Responsible for ensuring that all of your company's service and benefits needs are met. Oversees client relationship with ultimate responsibility for client satisfaction.

### Investment Analyst Team

Responsible for plan investment recommendations. Provides ongoing monitoring of investments.

### Plan Advisor

Responsible for working with your Retirement Plan Committee to support fiduciary responsibility as it relates to your overall plan success.

### Investment Consultant

Available to assist participants with investment questions related to their retirement plan. Provides employee education through a combination of group, one-on-one, and virtual meetings.



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