



experience **BKD**
Wealth Advisors, LLC

BENEFIT PLAN CONSULTING



experience

“The best part of my job is meeting face-to-face with a client. It helps me better understand their goals and how I can make a positive impact.”

—Nadine Givens
Senior Managing Advisor

What's driving you? Compliance issues? Employee retention? Meeting the retirement needs of both owners and employees? The list is likely a long one if you are a business owner or are responsible for your firm's benefit plans. **You need ideas.** We can relate. Benefit plan design, helping you comply with government filing requirements and investment management is the heart of our business. But we're also insightful consultants with the knowledge and resources to help you implement and administer plans. Add a personal, highly interactive and attentive service style, and you'll begin to understand what our experience **can help you achieve.**

ideas



700+

Experience practical direction *from professionals who administer more than 700 benefit plans.*

experience

STRATEGY & DESIGN

Develop a benefit plan that rewards owners and employees

INTEGRATED SOLUTIONS

Simplify by utilizing one firm for all of your benefit plan needs

INVESTMENT MANAGEMENT

Partner with professionals who see the big picture and understand the small details



FIDUCIARY RESPONSIBILITY

Utilize strategies to help you fulfill your ERISA requirements

REGULATORY COMPLIANCE

Comply with government filing requirements

insight

How will you get where you want to go? The ability to design a benefit plan and select investment offerings that will reward both business owners and employees is vital. BKD professionals have **the insight to help you** implement or restructure a plan to meet your needs, including 401(k), defined benefit, employee stock (ESOPs), 403(b) tax-sheltered annuity plans and profit sharing plans. But insight also depends on independent judgment, flexibility and having a deep familiarity with the subject at hand: **your business**. From plan design, implementation and compliance to investment management, you'll find we are able to share ideas and integrated solutions that are a win for you, your company and your employees.



\$1 billion

Experience a clear point of view *from a wealth management firm with more than \$1 billion in assets under management.*

A close-up portrait of a middle-aged man with short, graying hair, wearing a dark suit jacket, a white dress shirt, and a dark tie with light-colored diagonal stripes. He is looking slightly to the right of the camera with a subtle smile. The background is a solid, warm orange color.

experience

“At BKD we try to continuously offer best practices; we don’t limit our innovation to a single idea or client.”

—Rick Gutman
Managing Advisor

attention

Don't you deserve more return on relationships?

We think so. In fact, we believe we can't serve you well without knowing you well. Our benefit plan consultants and investment management professionals have exceptional credentials in administering employee benefit plans and working with complex financial data, but they're also available, reliable, proactive and **genuinely interested in you** and your business. So, tell us what's on your mind. We listen well, and with independent judgment, transparency and our ability to simplify issues, we'll find the answer. Experience what **unmatched client service** can do for your company's bottom line.

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top



*With our access to a top 10 U.S. CPA and advisory firm, you'll gain from our broad perspective on the issues you face and **experience peace of mind.***

How does our experience relate to you?

BKD Benefit Plan Consulting administers:

401(k) plans

Profit sharing plans

Money purchase pension plans

Employee stock ownership plans (ESOPs)

403(b) tax-sheltered annuity plans

Cross-tested plans

Defined benefit plans

BKD, LLP, one of the 10 largest CPA and advisory firms in the U.S., provides consulting, tax, assurance and accounting outsourcing solutions to businesses, governmental entities, not-for-profit organizations and individuals.

Praxity, AISBL, a global alliance of independent firms, provides our clients access to professional accounting and auditing firms committed to the high standards required in international business through our membership.

BKD Corporate Finance, LLC, provides merger and acquisition, sales, management buyout, ESOP, recapitalization and financing services. Member FINRA and SIPC.

BKD Wealth Advisors, LLC, an investment advisory firm registered with the U.S. Securities and Exchange Commission, provides personal wealth planning, investment management and estate planning.



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*The **BKD Experience** is a promise of unmatched client service brought to you by approximately 2,000 CPAs, advisors and dedicated staff who take your business personally. For more information, visit bkd.com.*