



WEALTH MANAGEMENT

Complimentary Evaluation from First Citizens Wealth Management

First Citizens Wealth Management understands how vital a successful retirement plan is, not just for compliance, but for supporting your employees and aligning with your organization's long-term goals. That's why we offer a complimentary evaluation to help you see how your current plan stacks up to other retirement plans.

Working alongside our trusted partner, EPIC Retirement Plan Services, we tailor retirement plans to fit your organization's goals and serve your team more effectively.

We take a close look at four key areas that can make a big difference in plans performance:

- Fees & Expenses: Are your costs reasonable, transparent, and competitive?
- Investment Lineup: Is your fund selection diverse and cost-effective?
- Plan Design: Is your structure designed to meet the needs of your workforce and support strong employee outcomes?
- Fiduciary Oversight: Are you meeting your fiduciary obligations with confidence?

To begin your evaluation, please provide the following documents:

- Annual Plan Review or Summary
- ERISA 408(b)(2) Disclosures
- ERISA 404(a)(5) Disclosures
- Total Plan Balance
- Number of Participants
- Administrative Fees
- Current Investment Options (including underlying investment fees)

Most of these documents can be found in your Annual Plan Summary from your current provider. If you are unsure where to start, our team is happy to guide you through the process.

Ready to Get Started?

Reach out to Colleen Mooney or Terry Bleile by calling 641-422-1600 or by emailing wealth@myfcb.bank.



Colleen Mooney
Associate Benefits Advisor I



Terry Bleile, CPA (inactive)
AVP, Wealth Advisor

Thank you for considering First Citizens Wealth Management. We look forward to showing you the value of transitioning your retirement plan to our team and our trusted partner, EPIC Retirement Plan Services.

Products provided by First Citizens Wealth Management are not FDIC insured, are not deposits of the bank and are not guaranteed by this institution; and are subject to investment risks, including possible loss of principal invested.