Retirement Plan Consulting

Entasis
ASSET MANAGEMENT

Important Questions

How are you addressing your fiduciary responsibilities and risks as plan sponsor?

How often do you conduct a review of your retirement plan investment lineup?

Is your retirement plan advisor independent and focused on your best interests?

How do the fees you are paying compare to industry averages?

Are you comfortable the fees you are paying are clearly reported to you?

Let us help you answer these and many other questions important to your role as plan sponsor.

Who We Are

Entasis operates as a fiduciary to retirement plans. We are capable of acting as an ERISA section 3(21) investment advisor or a 3(38) investment manager.

We customize all of our solutions to the needs of each retirement plan.

Our founders have an average of more than 15 years of experience in the investment industry.

Bob Batchelor, CFA
CEO
Co-Founder

C.J. Batchelor, CFA
CIO – Equity
Co-Founder

Mike Peters, CFA
CIO – Fixed Income
Co-Founder

Our Services

- Investment Policy Development
- Investment Menu Design
- Investment Monitoring
- Quarterly Reviews
- Fiduciary Oversight of Investments
- Total Plan Fee Analysis
- Service Provider Search Assistance
- Annual Plan Benchmarking
- Risk-based GenerationTech™ Portfolio Models for Participants
- Optional Participant Investment Planning Services


To learn more and sign up for a free retirement plan review visit us at
www.EntasisAM.com/Retirement

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IMPORTANT INFORMATION

Statements may be forward looking and are not intended as specific investment advice without further review of individual circumstances. Commentary, opinions, analysis, and recommendations may be subjective, do not guarantee future performance, and could change at any time without notice. Under no circumstances does the information contained within represent a recommendation to buy or sell any security.

This information is provided for informational purposes only and does not constitute individualized financial advice or create an advisor-client relationship.