DHG | wealth advisors LLC

RETIREMENT PLAN SERVICES

An Integrated Approach

DHGWA is a wholly owned subsidiary of DHG, a top 20 accounting and advisory firm, and works closely with their national practice, DHG Dealerships. The two entities collaborate industry knowledge and experience so that the DHGWA team may best help clients with their retirement plan needs.

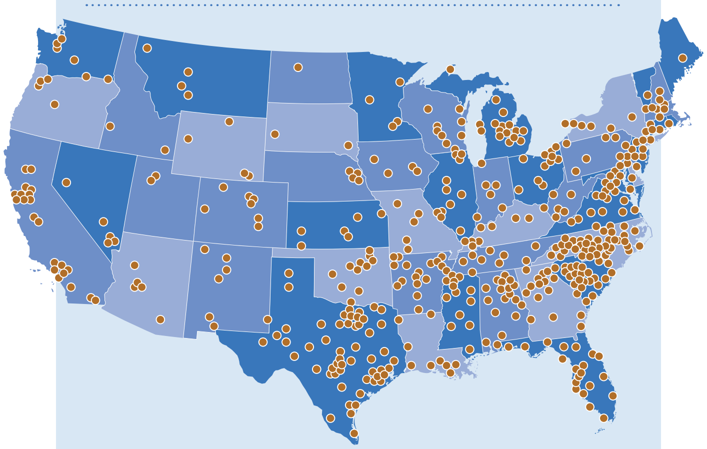
DHGWA Facts

15+ Years of Client Portfolio Management

$1.6+ Billion Dollars of Client Asset Management

20 Experienced Financial Advisors

DHG Dealerships Facts



1500+ Rooftops Served Nationwide

130+ Dedicated Dealerships Professionals

50 Dealership Clients in 50 States

6 Of the Top 10 Dealership Groups are DHG Clients

Who We Are

DHGWA is a fee-only Registered Investment Advisory firm (RIA) that acts as a fiduciary – assuming the same duty that a trustee owes to the beneficiary of a trust. We leverage the depth and knowledge of our team to offer clients a comprehensive retirement plan and wealth management option that includes:

- Plan design and administration
- Proactive investment monitoring
- Communication for participants

A Synergistic Approach

Our consultative approach tailors each plan to meet the unique and distinguishing needs of each client. Once a plan has been developed, our advisors:

- Help guide the plan participants on how to best utilize it to achieve individual investment goals
- Continually monitor the plan's investments and behaviors
- Help our clients make adjustments to provide the right retirement plan for their employees
- Assist clients in meeting their fiduciary and ERISA responsibilities

Should our Retirement Plan Services fit the mold of your organization, our next steps would entail a thorough Retirement Plan Diagnostic.

Services to Meet Your Needs

We are committed to full disclosure and accountability, combined with attentive, personalized client service. Working on a fee-only basis, we accept no commissions, outside fees or third-party payments. Your success is our success. Organizations looking for an efficient and cost-effective approach will immensely benefit from our Retirement Plan Services.

Fiduciary Process & Advisory Services

- Plan Design Consultation
- Vendor Analysis & Benchmarking
- Plan Cost Comparison
- Tailored Advice
- Implementation of Investment Policy Statement
- Investment Menu Development
- Ongoing Investment Due Diligence
- Advisory Education & Training for Employers & Employees
- Group Enrollment and One-on-One Meetings
- Proactive, Excellent Service