

PMG's Phoenix Retirement Builder Program™ for Small Businesses



PMG's PHOENIX RETIREMENT BUILDER PROGRAM™

*Designed for Small Business
Employee Education. Help
your employees rise from the
ashes as they near retirement.*



Do you feel behind in saving for retirement? How about your employees?

PMG Wealth Management can help your employees get back on track with their retirement savings within your company plan. **PMG's Phoenix Retirement Builder Program™** is specifically designed for the employee who feels behind in saving for retirement, nervous with their financial situation, or within ten years of retirement.

PMG's Phoenix Retirement Builder Program™

Small Business Employee Education

What is included for your employees?

- Initial introduction consulting meeting
- Financial planning conversation
- Complete company retirement plan review with employee (401k, PS, etc.)
- Semi-Annual, in person review sessions
- Questions by phone as needed to stay on track

BENEFITS TO YOUR COMPANY

By giving your employees access to a third party resource there are many benefits to the company and a plan administrator. The top three reasons are listed below.

Employees gain assistance in an area vitally important to their families wellbeing. By giving them access to retirement plan assistance you can help ease their minds to keep them productive employees.

As the employer or plan administrator, this helps meet your fiduciary requirement by offering ongoing retirement plan education to your employees.

With more retirement plan knowledge employees may increase or maintain current payroll deductions into the plan. This helps create stronger retirement savings for themselves, but also affects the percentages that guide how much the small business owner can contribute.

PMG Wealth Management

Our Financial Practice Team

Phil Guerrero, CFP®
President

For more than 11 years, Phil Guerrero has been helping clients develop strategies for meeting their financial goals at a well respected and major brokerage firm. In 2007 he established **PMG Wealth Management, Inc.™** to expand the resources and to increase the service level to his clients.

Phil is a Certified Financial Planner™ and holder of the series 7, 24, 31 and 66 registrations, as well as the life and health insurance license. Phil graduated from Illinois State University with a degree in Finance.

As a Chicago area native he and his wife, Megan, are active members of their local community. He is the **2009 President of the Lake Zurich Area Chamber of Commerce** and was awarded the Director of the Year award for 2006. Phil and Megan enjoy raising their two young boys.

Terry Maziarka
Administrative
Associate

Terry handles the day to day operations and back office support. Such areas include: client service, helping new clients in the transfer process, and financial administration support.

PMG's Phoenix Retirement Builder Program™

Small Business Retirement Education Pricing:

1-5 employees: \$995.
6-10 employees: \$1350.
11-20 employees: \$1950.
21-30 employees: \$2450.
31+: Call to discuss

***Help your employees get back on track. Call PMG
Wealth Management for more information.***