

Corporate Retirement Plans

We help you create and maintain plans that reflect your organization's care for its people.

Your business is booming, thanks in large part to the excellent team that supports it.

At HawsGoodwin Wealth, we help navigate the world of retirement plans and employee benefits packages, as well as the regulations associated with them, to create customized packages that adhere to our corporate clients' organizational cultures.

Give your team the support it deserves.

Know your options; know your costs.

In addition to constructing and maintaining its architecture, HawsGoodwin Wealth will deliver an in-depth understanding of the funds available in your company's plan. We happily attend to the details that shape the benefits your team is entitled to.

Our services include:

- Developing an Investment Policy Statement to enhance plan oversight and fiduciary responsibility
- Investment Committee training
- Information regarding underlying plan investment options specific to the company's investment objectives, including fees, risk and performance
- Target date fund or QDIA selection and suitability review
- Review and analysis of existing managers or mutual funds; the search, selection, monitoring and due diligence of new or additional investment managers or mutual funds. We utilize the Scorecard System™ 10-point Fund Scoring System.
- Plan benchmarking and expense analysis
- Management of the selection, oversight, and maintenance of the plan provider's tools and services
- Enrollment assistance during open enrollment and new hires between specified enrollment periods
- On-going educational participant outreach to cover relevant retirement and financial planning topics

Provide quality options. And we do mean quality.

We are also a trusted fiduciary that manages decisions associated with qualified retirement solutions. HawsGoodwin Wealth can serve as an ERISA Section 3(21) or 3(38) fiduciary to the plan in writing.

HawsGoodwin Wealth's fiduciary support services include:

- Fiduciary training and education to your selected committee
- Plan governance documents – Board Resolution, Fiduciary Acknowledgements and Committee Charter
- Engaging with programs such as the ERISA Fiduciary Calendar and Plan Management Responsibilities Fiduciary Diagnostic™
- Fiduciary compliance reviews to document completion of plan management responsibilities
- Plan and benefit design evaluations
- Annual fee and expense analysis vs. industry averages
- Quarterly legal and compliance updates
- Virtual Fiduciary File to organize and store plan documentation, helping to reduce liability.

We focus on helping clients responsibly grow their assets, reward their team, and build their knowledge over the long term. We're always accessible to maximize the team's use and understanding of your company plan.

ABOUT THE FIRM

FOUNDING DATE

August 1, 2008

HEADQUARTERS

Franklin, TN

FOUNDERS

Art Haws, CFP®

Cam Goodwin, CFP®, CPFA

Registered Investment Adviser
HawsGoodwin Wealth is laser-focused on delivering high-value, unbiased wealth management services that enrich our clients' lives. Our team of CERTIFIED FINANCIAL PLANNER™ professionals work as a team to guide individual investors and corporate clients alike through the financial decisions that matter.



Top
Financial
Advisers
2019*

FT 300 Ranking June 2019

HawsGoodwin Wealth is proud to be ranked in the **FT 300: Top Registered Investment Advisers of 2019.**

Make your mark.
Together, we'll make sure it lasts.
Get in touch for a complimentary consultation today.

(615) 771-1012

info@hawsgoodwin.com

HawsGoodwin Investment Management, LLC (HawsGoodwin Wealth) is an independent investment adviser registered under the Investment Advisers Act of 1940, as amended. Registration does not imply a certain level of skill or training. More information about HawsGoodwin Wealth, including our investment strategies, fees, and objectives can be found in our ADV Part 2, which is available upon request.

*The Financial Times 300 Top Registered Investment Advisers is an independent listing produced annually by the Financial Times (June 2019). The FT 300 is based on data gathered from RIA firms, regulatory disclosures, and the FT's research. The listing reflected each practice's performance in six primary areas: assets under management, asset growth, compliance record, years in existence, credentials and online accessibility. This award does not evaluate the quality of services provided to clients and is not indicative of the practice's future performance. Neither the RIA firms nor their employees pay a fee to The Financial Times in exchange for inclusion in the FT 300.