



A STEP AHEAD IN RETIREMENT PLANS

Warren Averett Asset Management works with clients to meet their employee benefit plan needs. A company may be looking for better investment options, a more cost effective plan design or a higher level of service. Warren Averett offers professionals with expertise in performing many aspects and services related to a company's retirement plan.

HIGHLIGHTS

- Approximately 120 plans with \$600 million assets under advisement
- Investment management and plan administration provided by one company
- Independent – not affiliated with a mutual fund family or insurance company
- Open architecture platform – Investment Committee chooses from thousands of mutual funds
- Transparent and easily understood fee structure
- Consulting and plan design services
- Serves as highest level [section 3(38)] Investment Fiduciary
- Ongoing plan review and employee education meetings
- Personal account service for each client with assigned dedicated advisor

401K COMPLETE

401k Complete, an offering by Warren Averett Asset Management and Warren Averett Benefit Consultants, is a unique comprehensive retirement plan solution that includes investment management and recordkeeping/administration services under one retirement plan umbrella. The result is fewer administrative headaches for the Plan Sponsor and a higher level of confidence and participation by the employees - all with a transparent and competitive fee structure.

401k Complete

Your total retirement plan solution.

ERISA 3(38)

Warren Averett Asset Management serves as an ERISA 3(38) investment fiduciary, making the investment management decisions (including selection and ongoing monitoring of the fund lineup, and asset allocation decisions for the risk based models) – all so you don't have to.



Learn more at www.401kcomplete.com

ABOUT WARREN AVERETT ASSET MANAGEMENT

Warren Averett Asset Management is a Registered Investment Advisory (“RIA”) firm that advises on assets in excess of \$1.7 billion. We strive to provide proactive, personal service by listening and fully comprehending your financial goals. We are different from many other asset management firms in that we are a fee-only firm, so our advice is independent and not based on selling any products, but rather, helping our clients achieve their financial goals. Learn more at www.WAasset.com.

ABOUT WARREN AVERETT BENEFIT CONSULTANTS

Warren Averett Benefit Consultants, LLC provides retirement plan design and administration services. Whether your organization has an existing plan or is considering starting a new plan, the Benefit Consultants team can help you streamline the administration and design a retirement plan that best fits the unique needs of your company. Regardless of the design, Warren Averett Benefit Consultants has the experience and expertise to successfully handle any of your plan needs.

“Our goal is to partner with clients to design and manage an optimal retirement plan solution. This solution must simultaneously align with company goals and empower employees to prepare for their future.”

– Steven C. Causey, CPA, AIF
Managing Director
Warren Averett Asset Management

EXPERIENCE A DIFFERENCE THAT WORKS TO YOUR ADVANTAGE

Count on: independence, we operate free from quotas, fund restrictions and proprietary products; discipline, a data-and-detail driven approach with in-depth research and reliable follow through; and a better return on relationships - advisors passionately committed to seeing you and your employees well prepared for retirement.

SERVING CORPORATE RETIREMENT PLANS RANGING FROM A FEW TO THOUSANDS OF EMPLOYEES

Warren Averett Asset Management’s 401k Complete covers the spectrum of corporate retirement plan needs, including:

- Investment management
- Daily participant recordkeeping
- Plan administration
- Compliance testing
- Government reporting
- Employee education meetings
- Documented annual plan reviews

For a complimentary plan assessment or to find out how we can help you, meet our team at www.401kcomplete.com or contact us:

Birmingham, AL - 205.979.4100
Huntsville, AL - 256.533.7610
Montgomery, AL - 334.271.2200
Pensacola, FL - 850.435.7400
Tampa, FL - 813.229.2321



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